

DOCUMENT RESUME

ED 377 391

CE 067 874

AUTHOR Rollins, Al; And Others
TITLE Opportunities for Creative Solutions: Integrating Gender Concerns into Development Projects. A Trainers' Manual--Volume II.
INSTITUTION MayaTech Corp., Silver Spring, MD.
SPONS AGENCY Agency for International Development (IDCA), Washington, D.C. Office of Women in Development.
PUB DATE Oct 92
CONTRACT PDC-0100-C-009021-00
NOTE 140p.; For volume I, see CE 067 873.
PUB TYPE Guides - Classroom Use - Teaching Guides (For Teacher) (052)

EDRS PRICE MF01/PC06 Plus Postage.
DESCRIPTORS Adult Education; *Citizen Participation; *Citizen Role; *Economic Development; *Females; Instructional Materials; Learning Activities; Lesson Plans; Participative Decision Making; Private Agencies; Program Design; Program Development; Sex Discrimination; *Sex Fairness; *Social Development; Staff Development; Voluntary Agencies; Workshops

ABSTRACT

This manual is designed to assist development professionals in nongovernmental organizations to provide effective training in the incorporation of gender considerations into their development programs and projects. It provides information and implementation of a 3-day workshop. Section I provides information on the manual content, structure, and underlying premises and includes a summary schedule, goals, and desired workshop outcomes. Section II focuses on workshop preparation and planning. It includes information on the following: preworkshop needs assessment, selection and preparation of the training staff team, logistical considerations, materials required, and welcoming participants. Section III provides workshop content in an abbreviated form and is for use in participants' notebooks. It includes session title, suggested time, objectives, and activities that have become the most common pattern for the 3-day workshop. Section IV contains more detailed session guidance for use by trainers and includes information found in Section III plus a session rationale and overview, specific activities, task descriptions, handouts, and newsprint used in the workshop. Section V includes a list of 61 resource documents and materials identified by the training staff. Section VI contains sample reference information for sessions 3, 4, 5, 9, and 10. (YLB)

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A TRAINERS' MANUAL - VOLUME II Opportunities for Creative Solutions: Integrating Gender Concerns into Development Projects

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Prepared for:
Office of Women in Development
Bureau for Research and Development
U.S. Agency for International Development
Washington, D.C.

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October, 1992

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Opportunities for Creative Solutions:
Integrating Gender Concerns into Development Projects

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Note: The United States Agency for International Development was reorganized in 1991. The Office of Women in Development is now in the Bureau for Research and Development (R&D/WID), rather than in the Bureau for Program and Policy Coordination.

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FOREWORD

A.I.D. was among the first donor agencies to recognize the central role of women in economic and social development. Its legislation and policy guidance on women in development have served as models to others. Because development implies change, implementing A.I.D. WID Policy and operationalizing Congressional mandates involves managing a change process intended to result in sustainable economic and social growth. A key aspect of this process has been the Office of Women in Development's training program.

The training program is dynamic and evolving; it seeks to increase men's and women's awareness of, knowledge about and skills and motivation to address gender issues in all A.I.D. policies, programs, and projects. Early emphasis was placed on the awareness aspect of the training goals, but, because we live in a dynamic world and because early training efforts have, in a real sense, "succeeded", awareness building is less of an issue today. The A.I.D. development professional now requires greater technical depth and skill-building.

Another change is taking place. While the primary training "client" group has been and continues to be the A.I.D. development professional in both Washington, D.C. and in the field, there is a growing need to include the private sector contractor and, especially, the Host Country Counterpart in training activities. The richness derived from the inclusion of a mix of people in a training event is accompanied by an increased complexity (training must be delivered in other languages, for example) and accompanying cost. But without such a change, the training will be less relevant and, certainly, the results will not be sustainable in the long run.

This said, the trainers' manual presented here is the result of four years of intensive work. The manual falls somewhere in the middle of a spectrum that begins with pure sensitization or awareness building, all the way to technical training on incorporating gender considerations in a course for agronomists, soil scientists, and private enterprise or credit specialists. It seeks to bring the participants into greater awareness about why gender must be a key variable in their work, provides them with an opportunity to share and gain technical knowledge about gender and women in development, and allows them to work on some initial skill practice in gender analysis and strategy design.

The users of the manual are encouraged to cut, paste, toss and redesign to make the contents fit their own needs. It is our hope that this publication can save some of the effort, time, money needed to design and deliver training in Gender Considerations in Development; that users can profit from our struggles, learnings and mistakes; and that the manual be used, as appropriate, to further include people, women, men, boys and girls as necessary participants in, contributors to, and beneficiaries of sustainable, effective economic and social development.

Ron Grosz
Office of Women in Development

ACKNOWLEDGEMENTS

This manual reflects the experiences and contributions of many people:

- the staff of the Office of Women in Development, who have the mission and mandate to institutionalize the importance of systematic and equitable inclusion of women in A.I.D.'s development policies, goals, and processes. Special appreciation is due the PPC/WID staff, especially Ms. Kay Davies, former Director of PPC/WID, and Mr. Ron Grosz, Project Officer, who provided continual encouragement, support, and challenge in the development of these materials.
- the many A.I.D. staff persons, both in the Washington office and in the Missions outside the United States, who gave generously of their time, insights, and suggestions.
- Women in Development professionals from other agencies, private voluntary organizations (PVOs), foundations, and independent consultants/trainers who were most helpful in sharing their experience and vision as we were gathering data in the development of this training manual.
- the more than 400 individuals from A.I.D. Regional Bureaus and missions and other development agencies who participated in A.I.D.- sponsored WID workshops.
- the women in developing countries who refuse to be invisible and underutilized in development strategies and their implementation.

Staff of The MayaTech Corporation prepared this document, which updates a training manual initially developed by Mr. Al Rollins and Ms. Virginia Hubbs, in collaboration with Mr. Ron Grosz (PPC/WID), under a separate contract. Ms. Hubbs, Mr. Rollins, and Mr. Grosz provided the technical expertise for this document as well, with additional assistance from Ms. Barbara Howald. Ms. Cheryl Buggs blended knowledge, styles, and graphics. Ms. Kettly Paul and her word processing staff skillfully and willingly responded to requests for additions and changes.

While we are thankful to all who contributed to this manual, responsibility for its accuracy and tenor rests with The MayaTech Corporation.

Jean-Marie B. Mayas, Ph.D.
Project Director

LIST OF ACRONYMS

A.I.D.	Agency for International Development
AP	Action Plan
CDIE	Center for Development Information and Evaluation
CDSS	Country Development Strategy Statement
CPSP	Country Program Strategic Plan
FSN	Foreign Service National
GENESYS	Gender in Economic and Social Systems
GIF	Gender Information Framework
HCN	Host Country National
NGO	Non-governmental Organization
NP	Newsprint
PID	Project Identification Document
PP	Project Paper
PPC	Program and Policy Coordination (Bureau for)
PVO	Private and Voluntary Organization
RD	Research and Development (Bureau for)
WID	Women in Development

SECTION I - BACKGROUND INFORMATION

Background Information

BACKGROUND INFORMATION

A. INTRODUCTION

This manual provides information on the organization and implementation of a workshop to increase incorporation of gender considerations into development programming. It is a product of the combined efforts of many organizations and individuals, including:

- the more than 400 individuals from A.I.D./Washington and field offices, host country governments, and non-governmental organizations who have participated in the Women in Development workshops that have formed the basis of this manual;
- the development professionals who, with their knowledge, skills, and values, identified the needs, provided the research, assisted in the interpretation of the data, and shaped the frameworks and designs which led to this training manual; and
- the Office of Women in Development, U.S. Agency for International Development (A.I.D.), which planned and authorized its development.

Underneath all these efforts are the daily experiences and voices of millions of women throughout the world who have resisted being "invisible" and underutilized in development strategies and their implementation.

Specifically, the manual derives from more than three years' experience by the Office of Women in Development (PPC/WID) and its agents supporting development professionals in following A.I.D.'s Women in Development (WID) policies and Congressional mandates, and in designing and implementing more effective development programs and projects.

B. PURPOSE AND SCOPE OF THE MANUAL

The purpose of the manual is to assist development professionals primarily in non-governmental organizations to provide effective training in the incorporation of gender considerations into their development programs and projects. (A companion manual, Volume I, is designed for training specialists working within or for A.I.D. who need additional knowledge and/or frameworks in order to assist A.I.D. personnel to better integrate gender considerations in development activities.)

The intended audiences for this training manual include:

- 1) training specialists with limited previous experience in the analytical frameworks and specific knowledge related to gender issues in development;
- 2) development professionals with WID expertise but little previous training experience; and

Background Information

- 3) professionals who have both the training skills and extensive knowledge of gender issues who might use this as a building block for next steps in this discipline and mission of institutionalizing gender considerations in project and program design, implementation, monitoring, and evaluation.

C. NOTES ON THE TRAINING DESIGN

The training design in this manual calls for an optimal participant population of 20 and not more than 40 persons. The training group size enables:

- 1) the building of an actively involved, participatory learning community;
- 2) individual, small group, and total community exercises with adequate reporting time and discussion; and
- 3) individual problem solving and action planning work with staff consultation.

Adjustments may be made in this number under special conditions with different goals and objectives and with appropriate training staff adjustments. **Examples of such adjustments and differing client groupings have been included elsewhere in this Trainers' Manual (see Table of Contents for specifics).** This training was initially designed for A.I.D. staff; increasingly, however, workshops have included representatives from nongovernmental organizations, host country governments, and consultants. This experience has demonstrated that in every case, careful needs assessments of the participants and the organization before the training are necessary for maximum learning.

It should also be mentioned that, increasingly, training events include a significant number of participants for whom English is a second language. This requires additional care and appropriate adjustments. **When you are training a group for whom English is a second language, or training others to conduct this training model, you will need from one and a half to two times the amount of time suggested for each session.**

The manual provides information for the development and implementation of a three-day workshop. It is organized as follows:

- Section I (this section) provides information on the manual content, structure, and underlying premises; also included are a summary schedule and goals and desired workshop outcomes.
- Section II focuses on workshop preparation and planning, and includes information on pre-workshop needs assessment, selection and preparation of the training staff team, logistical considerations, materials required, welcoming participants, and other aspects of successful workshop preparation.
- Section III provides workshop content in an abbreviated form and is for use in participants' notebooks. It includes session titles, suggested times, objectives, and activities which have become the most common pattern for the three-day workshop.

Background Information

Section IV provides more detailed session guidance, for use by trainers, and includes information in Section III plus a session rationale and overview, specific activities, task descriptions, handouts, and newsprint used in the workshop. An example of the session description format follows.

Session Description Format

TITLE: Titles for each session summarize the content of that period of the training.

TIME: The length of time the session requires is indicated. You have some flexibility to shorten or lengthen time according to the number of participants, any trainer options chosen, and the time limits of the workshop. The consequences of these options are discussed briefly in each session where appropriate. Starting and ending times are not given, since these will vary from workshop to workshop or from group to group. Choices made about daily schedules, starting and ending times, the number of working sessions each day, and length and timing of meals and breaks will determine the rest of the sessions' starting and ending times.

OBJECTIVES: Each session will list its separate objective(s) stating what the participants will accomplish during that session. These objectives provide staff one continuing way to evaluate the effectiveness of the training for participants.

RATIONALE AND OVERVIEW: Each session will have a description of the training theory or experience undergirding the design for the session and the summary of the process and outcomes anticipated. In some cases, this section will provide trainers with an introduction to the session for the participants. In every case, this section will assist trainers to prepare for each session.

ACTIVITIES: This will be your step-by-step description of the content and process to be followed, with suggested times and specific instructions for presentation, visual aids, materials, handouts, etc.

Visual aids are essential tools for highlighting workshop and session goals and objectives, for underlining major points in a presentation, for specifying training tasks, and for identifying group memberships. They will be highlighted in the ACTIVITIES section and indicated thusly (NP-1.1).

VARIATIONS: At the end of each session, if appropriate, there are suggestions for possible variations in the design and activities.

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- Section V includes a list of resource documents and materials which have been identified by the training staffs for use as pre-workshop reading materials, for informational reading during the workshop to support the training sessions, and as additional reading for participants following the workshops.
- Section VI incorporates sample presentation materials for selected sessions of the workshop.

The workshop model presented here is an adaptation of workshops originally developed for A.I.D. personnel, as well as the contractors, host country counterparts, and grantees who work with A.I.D. However, because the workshop focuses on increasing awareness and knowledge about gender issues, it is relevant to a much wider audience.

A common thread through the individual sessions is the Gender Information Framework (GIF), which was designed as a tool for addressing gender issues in A.I.D.'s programming. The GIF includes guidelines for gender analysis and incorporation of gender issues into four major A.I.D. documents: the Country Development Strategy Statement (CDSS), the Action Plan (AP), the Project Identification Document (PID), and the Project Paper (PP).

Although A.I.D.-specific, these documents typically have parallel documents in other organizations. For example, most non-governmental organizations will have a country strategy plan of some sort; they will begin the project process with a concept paper that identifies the major issues; and they will develop a project paper for new activities. Thus, the GIF concepts can be used as a framework for incorporating gender considerations into programs and projects.

The GIF and training materials address two critical issues in the development world:

1. Projects and long-term goals are more likely to be achieved when there is a fit between the program and/or project resources and the gender-based roles and responsibilities of the participants and/or beneficiaries. Development planners are often unaware of this fact, or seem to be when the planning documents are analyzed for evidence of these data.
2. Often the data necessary to incorporate gender variables into development programming appear to be absent or inadequate. However, in many countries, considerable data exist but are not known or readily available to planners. In such cases, data collection methodologies which are practical and cost effective are available and will be addressed in the GIF materials and the training.

Sessions are presented in sequence and, in order to increase the probability of a successful workshop, each session is to be delivered in the order presented. If you have little training or workshop delivery experience, you are advised to follow the manual closely. If you have more experience or have delivered this program more than once, you are encouraged to use your experience and creativity in making changes to fit particular participant populations and situations.

Background Information

Assumptions and Values Undergirding This Training Manual

Assumptions and values always guide the provision of consulting and training. And the basic assumption in the development of this manual and training is that we are engaged in a common learning situation, working collaboratively with the client in a problem-solving and skill (capacity)-building process. It is not a prescriptive process, but rather designed to assist participants to ask questions, to check their assumptions, and to come up with their own answers.

Other operative assumptions and values embodied in this training manual are:

- Participants ultimately learn what they actively desire to learn; they do not learn what they do not accept. The training is addressed to the identified needs of the organization and its staff in terms of increased knowledge, awareness, and skills.
- The adult learning model, sometimes referred to as the experiential learning model, which provides learning by disciplined reflection on direct experience in training sessions, offers the maximum opportunity for increased awareness, understanding, and skill building. In this model, participants have an active role and share in the responsibility for their learning.
- The most effective and transferable training is related as closely as possible to the actual work situations of the clients/participants. Training will focus on identifying and working on actual problems and issues defined by participants or by organizational policies and procedures.
- Training which results in planned action, utilizing the knowledge and skills learned in the workshop for specific tasks "back home", is most effective. This also results in increased "ownership" of strategies for change and reduces the tendency toward passive or active resistance of organizationally mandated policies and procedures.

Background Information

GENDER CONSIDERATIONS IN DEVELOPMENT

SAMPLE SUMMARY SCHEDULE

DAY 1

8:30 A	SESSION 1	WORKSHOP ORIENTATION
11:00 A	SESSION 2	EXPLORING THE ISSUES
12:30 P		LUNCH
2:00 P	SESSION 3	CONSIDERING GENDER IN THE DEVELOPMENT PROCESS
5:00 P		SUMMARY, EVALUATION, AND BREAK FOR THE DAY
6:30 P		DINNER AND SPECIAL EVENT

DAY 2

8:30 A	SESSION 4	DATA GATHERING
10:00 A	SESSION 5	STRATEGIES TO OVERCOME BARRIERS TO WOMEN'S PARTICIPATION IN DEVELOPMENT ACTIVITIES
11:30 A	SESSION 6	MANAGING THE PROCESS
12:30 P		LUNCH
2:00 P	SESSION 7	INDIVIDUAL APPLICATION
5:00 P		SUMMARY, EVALUATION, AND BREAK FOR THE DAY

DAY 3

8:30 A	SESSION 8	GENDER IMPLICATIONS IN THE POLICY ENVIRONMENT
11:30 A	SESSION 9	PLANNING FOR ACTION
12:30 P		LUNCH
2:00 P	SESSION 9	PLANNING FOR ACTION (CONTINUED)
3:00 P	SESSION 10	WORKSHOP SUMMARY, EVALUATION, AND CLOSING ACTIVITY
4:30 P		CLOSE OF WORKSHOP

Background Information

GENDER CONSIDERATIONS IN DEVELOPMENT

WORKSHOP GOAL

To increase awareness of, knowledge about, motivation, and skills for incorporating gender considerations into every stage of the development process.

DESIRED OUTCOMES

At the end of the workshop, participants will:

1. be able to relate factors in the gender analysis to specific programs/projects;
2. be able to use the GIF (or other gender analytical framework) as a resource document to incorporate gender considerations into development programs/projects;
3. be able to identify and use information resources available within the host country and elsewhere for effective design decisions incorporating gender;
4. be aware of and able to apply strategies incorporating gender considerations for programs/projects; and
5. be aware of types of linkages between gender considerations at the project and country programming levels.

SECTION II - PLANNING AND PREPARATION

Planning and Preparation

WORKSHOP PLANNING AND PREPARATION

In any training workshop, it is desirable to have clear information about the participants and their learning needs. This is true even when the learning goals are set by the organizational system; perhaps especially so, in order to lessen the negative conditions for effective learning deriving from a sense of forced attendance and corresponding resistance.

Pre-Workshop Needs Assessment, Orientation, and Readings

Therefore, we strongly suggest careful attention to pre-workshop planning for this training model, which minimally would include:

- 1) a basic needs assessment instrument for participants;
- 2) communication and orientation with senior staff;
- 3) readings and informational materials to participants well before the training event; and
- 4) materials, etc., they are to "fix" (Session 7 - Individual Application).

A basic needs assessment instrument, or framework for interviews, would include at least the following:

- 1) name, title, and role(s) of the participant;
- 2) feelings as they anticipate the training;
- 3) what they want to learn in this training;
- 4) what concerns or problems they anticipate; and
- 5) any other comments or suggestions.

We also suggest that senior staff receive an orientation to the goals, structure, and format of the training, preferably before participants have been identified or selected. This will assist in the identification of specific training needs as viewed by the organization, aid the process of selection, secure commitment and support from key staff and increase the rewards for attendance and full participation. Senior staff will be essential in suggesting, and perhaps even in recruiting and authorizing, appropriate persons to serve as local training workshop coordinators/administrators, and also local resource persons.

With the amount of technical material involved in this training, we think it is essential that participants have the opportunity to read and internalize some of this substantive material before the training sessions. Minimally, these readings will include some selected portions of the GIF, project evaluation summaries, and other relevant reports or papers focusing on gender issues in development. We suggest that some active response to these pre-workshop materials from participants be included in the needs assessment instrument and returned to the training staff. These data will assist the staff to fine-tune the basic design to fit more closely with the expressed needs of the participants of any particular workshop, and to begin to know the participants and their specific development work contexts.

Planning and Preparation

Local Workshop Coordinator

Consult carefully with local senior staff for this selection!

This staff support role and function is an extremely important one, particularly if the training workshop is to be held in a country or location other than that of the training staff persons. All administrative and logistical matters affecting the workshop and participants are part of their responsibility; for example, the training site and space(s), lodging, transportation, meals, material requirements of the participants and training staff, registration, and ongoing logistical and administrative support during and following the training. Make sure that all of these duties and functions are carefully and specifically negotiated very early in the workshop planning process. If the person(s) selected for this role and responsibilities is not very familiar with an experiential learning workshop and its requirements, an explicit set of instructions, given and negotiated carefully and well in advance, will be most helpful.

IF THE TRAINING SITE IS IN A COUNTRY OTHER THAN THAT OF THE TRAINING STAFF, THE SPECIFIC REQUIREMENTS FOR SPACE, ROOMS, ENVIRONMENT, AND OTHER SPECIFIC DETAILS MUST BE DESCRIBED VERY CAREFULLY TO THE LOCAL COORDINATOR/ADMINISTRATOR!

Training Staff Team

Following the learning needs of the participants, we strongly recommend:

- one trainer for each eight to ten participants
- a mix of gender, race, and age, if at all possible
- a mix of individuals who are intimately familiar with various sector and sub-sector technical specifics
- individuals who have wide experience in the participatory, problem-solving, adult education training model which undergirds this design and manual.

Our rationale for suggesting this kind of staff team is driven by the learning needs of participants, as well as by the assumptions and values of the educational model. Of necessity, in this kind of "hands on," experiential education, participants will often be working in small groups. It is most important that there be at least one staff person present in each of these small groups for both task and group maintenance consultative support. The desire for a mix of female and male training staff comes both from the desire to model the values we are espousing in the development program and project processes, and also to provide the differing styles and experiences of each.

Finally, this model requires:

- a Lead Trainer for coordination and leadership in the staff planning and administration - an integral and ongoing process and,
- staff team planning and preparation ideally that begins well in advance of the time of the workshop, and will continue for some time after its completion

Planning and Preparation

A Materials Development Specialist to provide the materials required for specific regional and sectoral training needs is also helpful.

On-Site Preparation

One of the most important steps in preparing for the workshop is staff team building. Since the staff may be traveling to the training site, plan on arriving at least two days in advance of the workshop. An early meeting with the local coordinator is a priority to check the training site and space, the conference materials needed, any materials which were sent ahead, and any audio-visual equipment requested -- to make certain that they are available and/or working properly. It is also important to determine whether all the administrative and logistic details are clear and being managed.

The full team will need to go through the entire workshop design session-by-session, particularly if the training is new to anyone. Specific assignments must be made for each session. Given adequate time, practice sessions of lectures and task assignments with feedback from the staff are very valuable. If the time is more limited, focus on the early sessions and the most difficult ones. The Lead Trainer has the responsibility for managing the staff team-building process and the overall workshop implementation and evaluation.

Visuals should be prepared a day, or at least the evening before the presentations. Keep visuals simple, clear, neat, colorful and print in large letters so that they can be seen clearly from the back of the training room. If you are using overhead projections, check their visibility from the back of the room also.

Staff responsible for each session should ensure that all of the handouts, newsprint and other visuals, and materials needed for their sessions are available in sufficient numbers.

Materials Required

The following general list of materials required for the training workshop should be shared with the local coordinator/administrator well in advance of the workshop dates. If they are available locally at reasonable costs, purchase there will facilitate staff travel and minimize excess baggage costs.

Newsprint (Flip Chart Paper) is needed for each session's objectives and schedule, lecture highlights, task assignments, small group work reports, etc. In the U.S., newsprint sheets measure approximately 27 x 32 inches.

Easels: If easels are not readily available at the training site, they can be constructed quite easily with local wood supplies following a simple pattern. However, if there is adequate black-board or wall space in the training site, newsprint can be taped to those surfaces. It is quite important that there be adequate wall space for posting newsprint around the room, for some sheets will be on display throughout the training workshop. Instruct the local coordinator/administrator to check the local training site's capability for this requirement carefully, for tape may harm wall finish, paint, or paper.

Planning and Preparation

Felt-tipped markers: Water color markers are the most effective type markers, though these are usually unavailable or quite expensive in many countries outside the U.S. Three boxes of 12 variously colored markers should be sufficient for most workshops and they can be purchased and carried by the staff.

Masking tape: Three rolls of 1/2 inch masking tape will suffice, and, if they are not available at the training site, they can be purchased in the U.S. and transported easily by staff.

Notebooks: Participants' Notebooks will be provided to organize the materials and handouts. These materials can be produced and collated in the U.S., boxed securely, and carried as excess baggage.

Paper punch: The paper punch must match the notebook ring spacing and is usually available locally. If most of the paper resources for the notebooks are produced in the U.S. and are either shipped or carried with staff, remember to match paper hole punch and notebooks.

Note paper and pencils for participants should be provided. Blank pages in the notebooks are often most helpful for participants.

Training Workshop Site

The site for an event like this one is an important element in supporting an effective learning environment. The facility should have sufficient lodging and meal capabilities in an informal setting, with adequate space for plenary sessions for all participants and staff, and with enough rooms for small group meetings of no more than eight persons each. It is helpful if the facility is away from the distractions of any local agency's office and the pulls of normal business demands. It is also very desirable that there be recreational opportunities at the site for participants' enjoyment during free times.

Setup of the Training Room

Before participants arrive, staff should instruct the local coordinator how to arrange the training room and the reception area in preparation for arrivals. The tables and chairs should be arranged in a fan or sunrise configuration pointing toward the space in the room for the easels or for newsprint visuals. Care should be taken to make certain each person will be able to see any visuals in the front of the room. If there are no staff of the conference facility to assist in setting this arrangement, then all training staff not engaged in other preparations should pitch in to help the coordinator.

Registration and Greeting of Participant Arrivals

The local coordinator/administrator and available training staff should be on hand to register arrivals and assist them to get settled-in easily. Some kind of welcoming refreshments and informal greetings from staff and other

Planning and Preparation

participants eases their entry into the workshop setting. A large, brightly colored sign of welcome on newsprint can set a favorable tone for the opening session.

Dinner and Special Event

A working dinner during a three-day workshop in the field provides an opportunity for continued learning in a relaxed atmosphere, while strengthening the connection between participants and the training staff. If funds and planning time permit, this event is strongly recommended. It can be organized as follows:

- pre-dinner refreshments
- dinner
- presentation
- closure

To date, the presentations have typically focused on "best practices" of the presenters in addressing gender issues. Examples of presentations are:

- presentations from 2-3 field office representatives (for regional workshops);
- audio-visual presentation by a host country organization, such as a women's cooperative, on their activities, problems, and best practices;
- panel presentation by host country NGOs;
- panel presentation by donor agencies; and
- presentation by host country government minister.

The "work" of the evening can also be combined with a social event, such as a play by a local theatre group during the refreshments.

The working dinner can be scheduled following the first full day of the workshop. Careful and specific preparation with the presenters well in advance of the event is essential. Identification of the guest speakers should be done by the sponsoring organization. The program should run for about one hour following dinner.

The content of the presentation optimally would include a description of the problem or problems addressed by the project or program, the project/program concept and design, and some strengths and areas for improvement in implementation. If barriers or constraints have been reduced or removed, what strategies were employed; what was the result of the activity; and what next steps are planned?

At the end of an intense day of training and a banquet meal, it is important that the presentation be as engaging and even entertaining as possible.

SECTION III - WORKSHOP CONTENT

Workshop Content

SESSION 1: WORKSHOP ORIENTATION

TIME: 2 - 2 1/2 Hours (depending on group size)

OBJECTIVES: (NP-1.1)

At the conclusion of this session, participants will:

1. have been officially welcomed to the training workshop by representatives of the sponsors;
2. have been introduced to the training staff and the logistics and administrative support team;
3. have reviewed policies and procedures for incorporating gender considerations in programs and projects relevant to their own work;
4. know the names and work locations of at least three persons they did not know before (if this is a multi-organization or regional event);
5. be aware of why the workshop is being conducted and what we intend to accomplish together;
6. know which of their expectations we can and cannot address; and
7. be aware that their active participation is critical to the success of the learning experience.

ACTIVITIES:

1. Official Welcome by Workshop Sponsors
2. Participant Introductions
3. Clarification of Expectations
4. Workshop Overview: Goal, Objectives, Schedule, and Norms
5. Summary and Closure of Session

Workshop Content

SESSION 2: EXPLORING THE ISSUES

TIME: 1 Hour, 30 Minutes

OBJECTIVES: (NP-2.1)

At the conclusion of this session, participants will:

1. have identified some implications for their own work related to women in development;
2. be able to describe how consideration of gender issues can affect project/program success and failure; and
3. recognize how failure to give consideration to gender differentiation can impede project success and/or the process of development.

ACTIVITIES:

1. Presentation of Session Overview, Issues, and Discussion
2. Small Group Task to Identify Concerns
3. Small Group Reports to Total Community
4. Summary Reflections, Discussion, and Bridge to Next Session

Workshop Content

SESSION 3: GENDER ANALYSIS

TIME: 2 Hours, 30 Minutes

OBJECTIVES: (NP-3.1)

At the conclusion of this session, participants will:

1. be able to list and use key gender factors in gender analysis;
2. have practiced gender analysis with a case example; and
3. have been introduced to the Gender Information Framework.

ACTIVITIES:

1. Presentation of Session Overview
2. Gender Analysis Presentation
 - Presentation Followed by Questions and Answers
3. Small Group Practice in Gender Analysis
 - Reading and Discussion of Case Example and Background Paper in Small Groups
4. Small Group Reports - Analyzing a Document Using the Gender Factors
5. Presentation of the Gender Information Framework
6. Summary Reflections and Session Closure

Workshop Content

SESSION 4: DATA GATHERING

TIME: 1 Hour, 30 minutes

OBJECTIVES: (NP-4.1)

By the end of this session, participants will:

1. have reviewed the reasons for and problems in gathering sex-disaggregated data; and
2. be able to list some methods and sources for rapid, low-cost collection of sex-disaggregated data needed for project design.

ACTIVITIES:

1. Presentation of Session Objectives and Overview
2. Review of Some Problems in Data Gathering - Plenary Discussion
3. Five Rapid, Low-Cost Methods for Data Collection - Lecturette and Discussion
4. Networking for Information Resources
 - Individual Reflection
 - Sharing Information with Other Participants
5. Summary Reflection and Session Closure

Workshop Content

SESSION 5: STRATEGIES TO OVERCOME BARRIERS TO WOMEN'S PARTICIPATION IN DEVELOPMENT ACTIVITIES

TIME: 1 Hour, 15 Minutes

OBJECTIVES: (NP-5.1)

At the conclusion of this session, participants will:

1. be able to identify at least three project features that are frequent barriers to women's appropriate participation in development activities; and
2. be able to select strategies for adapting mainstream projects so that key elements of the project incorporate gender considerations and, therefore, do not inadvertently discriminate against, or pose barriers to, the appropriate participation of women.

ACTIVITIES:

1. Introduction to Session, Review of Session Objectives and Activities
2. Plenary Session Review of Common Barriers to Women's Participation
3. Small Group Practice to Develop New Strategies for Incorporating Gender into Organizational Processes
4. Small Group Reports
5. Summary Reflections and Closure of Session

Workshop Content

SESSION 6: MANAGING THE PROCESS

TIME: 1 Hour

OBJECTIVES: (NP-6.1)

At the conclusion of this session, participants will:

1. have identified where gender issues should be included within their organization's program development process (e.g., project staff recruitment, scopes of work);
2. have identified assumptions about how gender issues will be considered in the programming process; and
3. have briefly discussed for one stage in the programming process alternative strategies for incorporating gender considerations.

ACTIVITIES:

1. Session Opening, Review of Objectives and Activities
2. Plenary Discussion of the Development Programming Process
3. Summary and Closure of Session

Workshop Contents

SESSION 7: INDIVIDUAL APPLICATION

TIME: 2 Hours, 30 Minutes

OBJECTIVES: (NP-7.1)

At the conclusion of this session, participants will:

1. have analyzed, individually and in consultation groups, the development materials they brought to the workshop for gender issues, additional baseline information needed, and strategies for adaptation;
2. have gained additional skills in identifying project activities and outputs which should reflect gender considerations previously identified;
3. be able to select strategies for designing/adapting mainstream projects so that key elements of the project incorporate gender considerations; and
4. have begun to develop basic criteria for distinguishing projects and programs which have adequately considered gender from those which have not.

ACTIVITIES:

1. Plenary Session - Presentation and Discussion
2. Individual and Consultation Groups Work on Development Materials Brought to the Workshop
3. Reports of Consultation Groups and Individual Applications
4. Summary and Closure of Session

Workshop Content

SESSION 8: GENDER IMPLICATIONS IN THE POLICY ENVIRONMENT

TIME: 3 Hours

OBJECTIVES: (NP-8.1)

At the conclusion of this session, participants will:

1. have examined gender-differentiated implications for project design of higher level objectives found in organizational mission statements;
2. have used factors of labor, resources, income, and expenditures in program/project analysis to discover where gender is a significant variable in the documentation process; and
3. have worked through an analysis of constraints and opportunities afforded by gender differences in roles and responsibilities to improve the documentation process.

ACTIVITIES:

1. Lecturette and Group Discussion: Gender Implications in the Policy Environment
2. Large Group Practice on Gender Considerations Among Levels of Programming
3. Small Group Exercise
4. Small Group Reports
5. Summary Reflections and Closure of Session

Workshop Content

SESSION 9: PLANNING FOR ACTION

TIME: 2 Hours

OBJECTIVES: (NP-9.1)

At the conclusion of this session, participants will:

1. have developed an action plan for incorporating gender considerations into a component of their work; and
2. have identified the data needed for implementing their action plan, and sources or methods for obtaining those data.

ACTIVITIES:

1. Introductory Presentation, Discussion, and Task Instructions
2. Individual Action Planning Work (with Consultation Groups if Desired)
3. Reports of Individual Action Plans, with Discussion
4. Summary and Closure of Session

Workshop Content

SESSION 10: WORKSHOP SUMMARY, EVALUATION, AND CLOSURE

TIME: 1 Hour, 30 Minutes

OBJECTIVES: (NP-10.1)

At the conclusion of this session, participants will:

1. have reviewed the training workshop content and process and discussed ways of incorporating the training in their work situations;
2. have provided written evaluations of the workshop sessions; and
3. have expressed whatever closing comments necessary to each other and the training staff, and prepared for their return to home and work.

ACTIVITIES:

1. Workshop Summary
2. Workshop Evaluation
3. Closing Activities

SECTION IV - SESSION DESIGNS

Session 1

SESSION 1: WORKSHOP ORIENTATION

TIME: 2 - 2 1/2 Hours (depending on group size)

OBJECTIVES: (NP-1.1)

At the conclusion of this session, participants will:

1. have been officially welcomed to the training workshop by representatives of the sponsors;
2. have been introduced to the training staff and the logistics and administrative support team;
3. have reviewed policies and procedures for incorporating gender considerations in programs and projects relevant to their own work;
4. know the names and work locations of at least three persons they did not know before (if this is a multi-organization or regional event);
5. be aware of why the workshop is being conducted and what we intend to accomplish together;
6. know which of their expectations we can and cannot address; and
7. be aware that their active participation is critical to the success of the learning experience.

RATIONALE AND OVERVIEW:

The workshop begins with an official welcome and opening remarks by a senior staff member from the host organization. Strong and enthusiastic support from key leadership assists greatly in setting a positive tone for the training to follow. The opening speaker also introduces the training staff representative, who reviews the workshop goals and objectives.

As quickly as possible in this opening session, participants are provided the opportunity to introduce themselves to the training team (and to each other if that is necessary). This reinforces the participatory norm, getting everyone on his/her feet speaking and also listening carefully to one another.

It is also important that the participants' expectations or learning goals for the workshop be identified quickly and checked against those goals and objectives developed by the training staff. This is especially important when attendance in the workshop may be involuntary and the participants are unfamiliar with the training methodology. Expectations among participants may vary considerably. Further, confused or conflicting expectations which are not clarified early in the training can block or hinder learning.

Session 1

ACTIVITIES:

1. Welcome (25 Minutes)

Senior officers of the host agency begin the workshop with opening remarks of welcome. To set the tone of the workshop, it is important that they both note the importance of the training and also review their agency's policy related to gender issues. If a senior officer is well-versed in gender issues, he/she can use this opportunity to initiate the process of redefining "women in development" from its historical association as an equity issue to the more recent concept of gender as an important factor for project success. This begins the clarification of some of the language and terms which the participants will be hearing and using in the workshop during the next three days. If the senior official is not able to discuss these concepts easily, the training team can introduce them in this session and develop them more fully in the next session.

A very brief introduction of the lead trainer should be made at the end of these welcoming remarks.

2. Introductions (1/2 - 1 Hour)

The lead trainer acknowledges the opening remarks and introductions, may make additional brief greetings, and adds some adaptation of the rationale above. The trainer briefly reviews the Session Objectives (NP-1.1), presented above and in the participants' notebooks.

The trainer then requests that participants introduce themselves to the total community, giving them the following task:

(NP-1.2)

Introduce yourself to us by answering the following:

- a. Your name
- b. Your work (job title)
- c. Where you work (division or office, other institution, country, etc.)

Trainers should introduce themselves by answering the same questions. They may either begin the introductions or wait until some participants have presented themselves. It will be important to keep these introductions moving along smoothly and also to gently but firmly monitor the time for each person. Keep the atmosphere easy and informal. The lead trainer may feel free to interact with participants and comment on their answers. This will also model an informal and interactive style for other participants and help set an effective learning climate.

Session 1

3. Expectations (30 minutes)

Each participant will have an opportunity to identify, and to discuss with several other participants, what they want from this workshop. The trainer introduces this activity by saying something like, "We have designed this training workshop from information we gathered from a number of your fellow professionals and from policies and procedures of your organization in order to assist you in your work. We now want to learn from you what you want to get from this training. We also want to check the goals of this workshop against your expectations to determine together which ones are most likely to be realized, and which are not."

Participants form groups of five persons, preferably with other participants they know least well and would like to know better, with the following task.

(NP-1.3)

You have 15 minutes to:

- Introduce yourselves
- Take 2-3 minutes each to write your answer to:

What are the two most important things I
want to get out of this workshop?
- Share and discuss your responses
- Select one member to be the recorder/reporter;
make a group list of five expectations from
your discussion.

The trainer will need to keep time for the groups, warning them when they have 3 minutes left to finish their summary. Call time in 15 minutes, and with the groups remaining in place, ask for two answers only from each group in turn. One of the training staff records each group's answers on a sheet of newsprint in the front of the room, reducing the answers to short statements which capture the essentials of their statement accurately. Keep the reporting as brief as possible, asking participants to omit any expectations given in previous reports. When you have received two expectations from each of the groups, ask if there are any additional ones which have not been noted.

Normally, most of the participants' expectations will be met, especially if the invitations and advance notices have been clear. The trainer should make notes during the reporting of any expectations which may not be met within the workshop and note these during the next presentation.

Session 1

Tell the groups that you will return to their listing of expectations after a review of the Workshop Goals, Objectives, and methodology. Keep their list clearly visible so that participants can refer to it during the presentation of the workshop overview.

4. Workshop Overview: Goals, Schedule, Methodology, and Norms (20 minutes)

This is primarily a presentation by the trainers with visuals and handouts. Post the Workshop Goals (NP-1.4), Schedule (NP-1.5), and Norms (NP-1.6) and go over them with the participants. Questions are encouraged during this presentation for it is important that this information is clearly understood by the participants. Questions also allow the trainers to expand on the brief statements on the visuals, and to check them against participants' expectations. This is also the time to identify any expectations which you think will not be met in this workshop. Participants usually accept the reality that some expectations will not be met when they are clear about it in the beginning. Sometimes those expectations can be met outside the normal workshop structure and schedule during meals, breaks, or specially scheduled consultations with staff or other participants. Participants should be encouraged to initiate these contacts.

Briefly go over the overall workshop schedule, noting where the goals will be met, and the training activities to be utilized. Explain briefly the methodologies to be employed (e.g., lectures and discussions in plenary sessions, questions and answers, individual and small group work, action planning, case studies) and that this will be a participatory experience, with the emphasis on learning by doing and reflecting on their experience.

Norms are ways of working and learning together most effectively and describe ways of behaving that we can expect of both staff and participants. Present the following prepared list (or one which your team chooses) of workshop norms and add any which the participants might suggest.

(NP 1.6)

NORMS: WAYS OF WORKING TOGETHER MORE EFFECTIVELY

- * Attendance at all sessions
- * Starting and ending all sessions on time
- * Active participation
- * Each person responsible for own learning
- * One person speaks at a time
- * Active listening to one another
- * Cooperation/Competition - both essential
- * Mutual respect, especially with differing ideas
- * Open and trusting environment for questions
- * Have fun while working and learning

Session 1

The design, the learning activities, and the methodologies and training behaviors need to reinforce the norms and assist in setting an effective learning environment.

The trainer should briefly describe the trainer/facilitator role as: one who is responsible for designing and managing the process for the training activities to meet learners' needs, an occasional expert and resource person, one who guides the learning process and sees learning as learner-centered rather than teacher-centered.

The role of the local coordinator/administrator should also be briefly described at this point. That person is responsible for all workshop logistics, including liaison with management of the facility housing the participants and staff. All complaints or suggestions regarding housing, meals, refreshments during breaks, supplies, etc., should be directed to that support person for action. This would be an appropriate time to have the local coordinator/administrator go over the necessary logistics with the participants and answer any questions or concerns they might have.

Finally, return to their list of expectations as promised at the beginning of this presentation and check with the participants to determine if there are any expectations which they, or the trainers, do not think can be met in this workshop as described in the Overview.

The trainer should then summarize the opening session's activities and rationale, referring briefly to the next session's agenda, and thanking participants for their part in getting this workshop started with energy and active participation. A break follows.

5. Summary, Closure, and Bridge to Next Session

TRAINER COMMENTS:

1. Some participants have expressed reluctance to spend this amount of time on orientation. Others have strongly affirmed the time spent in this session, particularly if the participants do not know one another well, and especially if the group includes both American and international participants or representatives of various field offices. In many cases, opportunities are limited for diverse groups to work together on development issues; therefore, this level of orientation begins the process of discussion and collaboration.

2. Some participants will request to be present as "attendees" or "observers," therefore free to come and go as their interest and schedule allow. This practice is disruptive to the participant community and the workshop norms for learning. Therefore, participants are urged strongly to come only as full participants, committed to the entire workshop design and schedule.

3. Some common questions that have been raised in this session are:

- What is gender, and how do you consider gender?
- Why do you use "gender considerations" rather than "women in development?"

Session 1

- Why do we need to stress the participation of women in the total process of development planning and implementation?
- How can I convince others (bosses, colleagues, host country ministers, contractors, etc.) that gender considerations are important?

Session 2

SESSION 2: EXPLORING THE ISSUES

TIME: 1 Hour, 30 Minutes

OBJECTIVES: (NP-2.1)

At the conclusion of this session, participants will:

1. have identified some implications of gender issues for their own work or the country/sector development activities in which they are involved;
2. be able to describe how consideration of gender issues can affect project/program success and failure; and
3. recognize how failure to give consideration to gender differentiation can impede project success and/or the process of development.

RATIONALE AND OVERVIEW:

Participants have heard senior officials from their organization discuss what they are expecting in terms of women in development. These policies may have been around for some years with little effect on actual work. In the pre-workshop materials, and, ideally in the opening session, they will have read and/or heard that project evaluations indicate that integration of gender considerations into projects and programs has not been accomplished very well. Further, those evaluations strongly indicate that this failure has significantly affected program/project economic and social effectiveness, and sustainable development. Hopefully, it is becoming clear to them that the integration of gender considerations in every aspect of their development activities has become both a serious institutional priority of their organization and also one way of increasing development effectiveness and sustainability.

In this session, participants are encouraged to explore the implications of organizational policies related to gender for their work, the relationships to other issues, some potential effects of failure to give adequate consideration to gender, and how adequate consideration of gender in policy and project design can increase success potential.

Session 2

ACTIVITIES:

1. Plenary Session - Overview of the Issues and Questions and Answers (30 Minutes)

The trainer introduces this session by stating the Objectives and the Rationale set out above. This is an opportunity to more fully develop the concept of "gender considerations" (as an expansion of the earlier concept, "women in development"), if this discussion did not take place in the first session. Here the trainer can discuss project evaluations and research findings from a variety of sources which indicate that failure to consider gender can adversely affect project success. For example, the Center for Development Information and Evaluation (CDIE) at A.I.D. found in its evaluation of A.I.D. experience with women in development, that:

mainstream projects that ensure women's participation in proportion to their roles and responsibilities within the project's baseline situation are more likely to achieve their immediate purposes and their broader socioeconomic goals than are projects that do not.

"Mainstream projects" is used in contrast to "women's projects"; that is, regular development projects are more likely to succeed if they pay attention to gender-based roles and responsibilities.

Many other organizations have come to the same conclusion. Examples can be found in the resource documents listed in Section V. Examples can also be drawn from the host institution's development activities. Discuss with the group the implications for their own work of these findings as they relate to the following.

(NP-2.2)

1. INFLUENCE OF GENDER ON THE DEVELOPMENT PROCESS
2. IMPACT OF GENDER ISSUES ON POLICY AND PROJECT DESIGN
3. RELATIONSHIP OF GENDER TO OTHER ISSUES

Encourage questions from the participants about their experience incorporating gender in their work, difficulties they have encountered, and "successful" activities and/or results. It is important in this session to affirm any positive experiences of participants' "successful" integration of gender concerns in their development activities and, if possible, briefly elicit some verbal descriptions of key factors in those "successes."

2. Small Group Task to Identify Concerns (25 Minutes)

Form small groups of from 5 to 6 persons each, preferably a maximum mix of persons who know each other least well and want to know each other better, and then present the following task.

Session 2

(NP-23)

SMALL GROUP TASK

DISCUSS TWO OF THE FOLLOWING (TO BE ASSIGNED)

1. WHAT ARE SOME IMPLICATIONS FOR YOUR OWN WORK FROM INSTITUTIONAL MANDATES OR POLICIES ABOUT GENDER?
2. HOW DOES APPROPRIATE CONSIDERATION OF GENDER RELATE TO OTHER ISSUES YOU MUST ADDRESS IN THE PROCESS OF IMPROVING THE WAY DEVELOPMENT IS CARRIED OUT?
3. WHAT ARE SOME POTENTIAL EFFECTS OF FAILURE TO GIVE ADEQUATE CONSIDERATION TO GENDER ON SUCCESS OF YOUR PROJECTS, OR THE PROCESS OF DEVELOPMENT?
4. WHAT ARE SOME WAYS THAT ADEQUATE CONSIDERATION OF GENDER IN POLICY AND PROJECT DESIGN CAN INCREASE THE SUCCESS POTENTIAL OF A PROJECT?

BE PREPARED TO PRESENT A SUMMARY OF YOUR DISCUSSION AND FINDINGS TO THE TOTAL COMMUNITY.

YOU HAVE 25 MINUTES FOR THIS TASK.

3. Small Group Reports (30 Minutes)

For these reports, encourage brief responses consisting of a summary of the group's discussion and findings. The process of the groups' explorations and their hearing others' responses to these questions is the important element of the session.

4. Summary Reflections, Discussion, and Bridge to the Next Session on Gender Analysis (5 Minutes)

TRAINER COMMENTS:

1. In the earliest stages of this training, the assumption was that some participants would be very positive about the focus on women's economic roles, which have been essentially overlooked in the development process, while another significant proportion would be curious and interested in what women in development issues and

Session 2

related organizational policies are. The remainder would have been told to come to this WID training, and were at best ignorant about gender differential impacts in their work or, worse, negative about the issue overall. This assumption was essentially accurate in the early stages of training. However, at the present writing, both the awareness of the need to consider gender issues and more positive expectations for the training have increased noticeably. Therefore, this session is one which may be shortened or dropped if necessary to fit a reduced time allowance.

2. If the training needs assessment indicates limited awareness of gender issues and/or active resistance to compliance with organizational WID policies, this session becomes more essential. It can provide, in this situation, an opportunity for both awareness-building and also the expression of any negative feelings about the training content and process to surface. This process would assist in modeling the participatory, collaborative, problem-solving climate that is important in this training design and its anticipated outcomes. In fact, this session might well have to be redesigned to allow such a process to surface more specifically.

VARIATIONS:

This session lends itself to a variety of approaches, which can be selected according to the participants' experience and interests, as well as organizational policies. A few alternatives follow.

1. In the early training workshops, we used a half-hour slide presentation, "Invisible Women," developed by Susan Poats, in this session. It focuses on women's roles in agriculture around the world. It was followed by an opportunity for the participants to process their thoughts and feelings from the audio-visual experience. An edited and professionally narrated video presentation is now available. The plenary or small group work following can focus on specific factors (e.g., labor, income, access to/control of resources) in the slide video, or on participant experience with the issues and concerns discussed in the video.

The slide video is available from A.I.D.'s Office of Women in Development.

2. For workshops in the field, a panel of host country resource persons describing significant gender issues has been a very effective way to initiate discussion about gender as a cross-cutting development issue. These resource persons can be identified by local field staff, by training staff in their planning visit, and by other development professionals with specific experience and contacts in the host country. The criteria for their selection are that they be knowledgeable about development issues in their country and specifically the role of women related to those issues, willing to work with the host organization on these issues in the future, and willing to work with the training staff team in advance of the event. This latter criterion is essential in integrating their presentation with the goals and objectives of the training, and in assisting in the development of a supportive staff team. It is important that these resource persons be approved and invited by the senior staff of the host organization in order to encourage full ownership of their presentation, to further the process of their participation in the organization's development planning and implementation, and to avoid any political or protocol errors.

Session 3

SESSION 3: GENDER ANALYSIS

TIME: 2 hours, 30 minutes

OBJECTIVES: (NP-3.1)

By the conclusion of the session, participants will:

1. be able to list and use the key factors in gender analysis;
2. have practiced gender analysis with a case example; and
3. have been introduced to the Gender Information Framework as a resource for programming.

RATIONALE AND OVERVIEW:

This session is an important initial presentation of gender analysis, as described in the Gender Information Framework (GIF). The GIF, developed for use in A.I.D. development programs, describes a process for integrating gender issues into development programs.

In the GIF, the Gender Analysis Map is used to identify gender-based differences in a project situation. This is followed by guidelines on how to use the results of the analysis in A.I.D. documents. Although designed for A.I.D., the GIF is adaptable to other organizations. Alternatively, other gender analysis frameworks, cited in Section V, may be substituted for the GIF in this session. Whichever framework is used for gender analysis, the session is strengthened by illustrations from the trainer and/or participants (depending on the participants and the trainer's style.) A sample presentation is also provided in Section VI.

The content of the GIF is available in Sections 1-3 of "The Gender Information Framework: Guidelines for Incorporating Gender into A.I.D. Programming," which is available from A.I.D.'s Office of Women in Development. Key elements (minus the supporting rationale) can be found in the GIF Executive Summary or the GIF Pocket Guide, also available from A.I.D.

The gender analysis presentation is one of the few lectures suggested in this manual, and substantive information will be communicated both orally and with visuals. It is important, however, to keep the lecture presentation as concise and light as possible.

Participant involvement and learning opportunities are structured with small group work on a case study following the gender analysis presentation. The case study should describe a development project of the host institution. It can be an edited project paper or project concept paper with a focus on a particular sector. We would recommend the case study be no more than 2-3 pages in length and that it be supplemented with a very brief background piece on men's and women's roles in the country where the project takes place. If an agricultural project is chosen, we would select a project paper with a focus on only one crop and only one

Session 3

animal. Carefully edit the project paper to make it realistic, yet feasible, for this important initial exercise in gender analysis.

The session ends with a presentation of the rest of the GIF. Trainers may want to present an alternative model for addressing gender issues that more closely fit the situation of the sponsoring organization.

ACTIVITIES:

1. Session Overview
2. Gender Analysis Presentation (30 minutes)

The trainer opens this presentation with a few comments from the previous session, the Objectives for this Session (NP-3.1), and material from the Rationale above.

Put the 4 Exploratory Factors and Conclusion-Drawing Factors from the Gender Analysis Map on newsprint (NP-3.2). A HANDOUT of the Gender Analysis Map should be available for the participants' use, in case they did not bring their pre-workshop materials with them to this session.

Session 3

(NP-3.2)

Exploratory Factors

1. Allocation of labor
 - household production
 - agricultural production
 - enterprise/other
2. Sources of income
 - farm
 - enterprise, wage labor
3. Expenditures
4. Resources: Access to and control of

Conclusion-Drawing Factors

1. Constraints to participation and project benefits
2. Opportunities

The trainer should review each of these factors, how they influence development programs, and why they should be considered in analysis of the project's baseline situation. The trainer can use material provided in Section VI to flesh out this presentation, his/her own examples, or examples provided by participants.

Check carefully for clarity, understanding, and acceptance following this presentation, for these variables are the foundation for all that follows. Take time to ask questions and encourage discussion by the participants, answering all questions as thoroughly as possible within the time limit.

3. Small Group Exercise in Gender Analysis (45 minutes, depending on the number of participants and groups)

For this exercise, we suggest that the trainers form small groups of no more than 7 persons each. We also suggest that the criteria for forming the groups be a maximum mix -- by gender, by work location, by age, by sector, etc.

Session 3

Make these groupings from the pre-workshop and registration information before this session, and list the names for each group, with their work space assignment, on a sheet of newsprint.

Also provide each group with a newsprinted list of the key factors in gender analysis (Exploratory Factors: labor, income, expenditures, resources; and Conclusion-Drawing Factors: constraints and opportunities).

(NP-3.3)

SMALL GROUP TASK: (60 MINUTES)

1. When you have gathered in your assigned work space, take the time to introduce yourselves to one another. Then quickly select one person to serve as group leader, and one to serve as recorder/reporter.
2. Read the project description carefully. Determine what sex-disaggregated data are missing from this project description for the key gender factors. Note, therefore, what additional data need to be obtained. **DO NOT SPEND A LOT OF TIME LOOKING FOR MISSING INFORMATION!**
3. Do the gender analysis for this document for all six factors; chart the key elements of your analysis on the newsprint provided.
4. What are some of the implications based on your group's gender analysis?
5. What project adaptations would you suggest based on your group's analysis?
6. Record your group's answers to questions 2, 4, and 5 on newsprint also for reporting to the total community.

4. Small Group Reports (45 Minutes)

For this reporting, it is important to hear from each group, though repetition of the same reports from each of the six groups in order will be inappropriate, and perhaps even boring. Therefore, we suggest that the trainer managing this reporting ask for one group's answer to No. 2 in the task assigned (information missing). Check that answer with the other groups to hear if they might have different answers. If so, discuss the reasons for these differences in the total community.

Next the trainer asks for answers to No. 3, and calls on each of the groups in turn for one of the six factors in the Gender Analysis Map. After each of these group reports, check with the other groups to determine if they found something different and discuss why.

Session 3

Repeat this process for Nos. 4 and 5.

5. Presentation of the GIF (15 minutes)

The GIF has three main components. The first is the "Gender Analysis Map," just used, which guides the user through the analysis of men's and women's roles and responsibilities that affect/will be affected by a development project.

A second component is called "Gender Considerations," which provides information for preparation of A.I.D.'s country strategies, country Action Plans, Project Identification Documents, and Project Papers. The GIF reflects the fact that gender issues need to be considered throughout project documents. While historically, a WID paragraph has been incorporated into social analyses in programming documents, it is now recognized that gender issues need to be reflected in project objectives, implementation plan descriptions, budgets, input and output descriptions, and other parts of the main body of the document.

The final section in the GIF is a "Summary of Guidelines for Document Review," which suggests, in general terms, where to incorporate gender considerations.

A sample presentation of the GIF can be found in Section VI.

6. Summary Reflections, Bridge to the Next Session, and Closure (15 minutes)

Close this session by asking the total community some questions which will assist in their reflections, for example: What are some things you discovered in this exercise in gender analysis? What was most helpful in this process? What was least helpful? Recall with them that the Gender Analysis Map (or alternative framework for analysis) is the basic tool for incorporating gender considerations in the development process, and that gender information should be included at every stage and in every document.

Bridge to the agenda and schedule of the next session and close.

VARIATIONS:

At the close of this session, the trainer might wish to ask the total community to identify the key factors in project design, after covering the newsprint from the presentation. Praise the results of this "Pop Quiz," reminding participants that they have mastered the essential elements of gender analysis.

An oral evaluation would be appropriate at the close of this session. Trainer could ask for feelings about the training so far; content of the GIF (or alternative framework); the pace and schedule; what has been most helpful; and suggestions to improve the workshop. One of the training staff should be assigned to take notes of the evaluative comments for staff planning.

Session 4

SESSION 4: DATA GATHERING

TIME: 1 Hour, 30 Minutes

OBJECTIVES: (NP-4.1)

By the end of this session, participants will:

1. have reviewed the reasons for and some problems in gathering sex-disaggregated data; and
2. be able to list some methods and sources for rapid, low-cost collection of sex-disaggregated data needed for project design.

RATIONALE AND OVERVIEW:

The primary resources, in addition to the experience and skills of the trainer presenting this material and the participants themselves, will be the prepared newsprint visuals from Rapid, Low-Cost Data Collection Methods for A.I.D., A.I.D. Program Design and Evaluation Methodology Report No. 10, by Krishna Kumar, CDIE/AID, December, 1987.

This information is presented in response to the concern expressed by many development professionals that the data required to supply sex-disaggregated data in every stage of the development process were not readily available, and that the collection and analyses required was too time consuming and expensive. We intend to offer some support tools to ease these concerns, and also an opportunity to identify other data sources within the host institution and/or host country. As a short overview of data gathering methods, this session works best for participants with minimal data analysis/research experience.

Often significant sex-disaggregated data resources exist in the host country, and sometimes within the host organization itself. If in-country planning and needs assessment visits are possible, such data may be located and identified for use in the training.

ACTIVITIES:

1. Session Overview and Presentation of Session Objectives (5 Minutes)
2. Review of Problems in Gathering Data (30 Minutes)

The trainer should touch on some of the remarks made about data gathering in the previous presentation. The emphasis here will be on gathering data at an appropriate level of detail and cost for the stage in the process

Session 4

on which one is working: we will be discussing "quick and dirty" or rapid, low-cost data collection methods. Emphasize that just because the data gathering process is a rapid one in some cases, it does not mean automatically that it is less useful or reliable.

However, it should be noted at this point that collecting sex-disaggregated data on every program and project where gender differentiation may have an impact will definitely require additional creativity, energy, time, and money. Note also, that there is a growing body of information that this will increase effectiveness of development assistance, improve the economic condition of the host countries, and improve the quality of life and economic well-being of the poorest persons, groups, and communities.

The trainer begins by eliciting from the group some of the problems commonly experienced in data collection. This acknowledges the frustrations often felt by field staff about requirements from headquarters for more information. Below is a listing of some of the commonly identified problems. This can be presented as an audio-visual to supplement participant responses.

(NP-4.2)

PROBLEMS IN GATHERING DATA

- **ILLITERACY**
- **LANGUAGE BARRIERS**
- **EXPENSE**
- **LACK OF ADEQUATE TIME**
- **INVASION OF PRIVACY**
- **SUSPICION**
- **BIAS**
- **RAISED EXPECTATIONS**
- **CULTURAL NORMS/MORES**
- **TALKING TO THE WRONG PEOPLE**
- **POLITICS**

3. Presentation and Discussion: Five Rapid, Low-Cost Methods for Data Collection

The trainer moves into the presentation by noting that the methods to be reviewed below can assist directly with two of these problems: "Expense" and "Lack of Adequate Time." They will also suggest ways to avoid some of the other problems, such as "Talking to the Wrong People" and "Cultural Norms/Mores."

RAPID LOW-COST DATA COLLECTION (HANDOUT)

1. KEY INFORMANT INTERVIEWS
2. FOCUS GROUP INTERVIEWS
3. COMMUNITY INTERVIEWS
4. DIRECT OBSERVATION
5. INFORMAL SURVEYS

Begin by reviewing each of the data collection methods above, noting where they are particularly useful and where inappropriate. The trainer can use the data needs identified in the previous day's gender analysis case example to illustrate how these methods might provide the needed data. Participants can add their own experiences with these kinds of methods. A brief description of each method is below, with a more detailed sample presentation provided in Section VI.

Key Informant Interviews

These interviews involve in-depth discussions on a specific topic with knowledgeable persons in order to obtain data, opinions, and perspectives on a topic. Key informants need to represent various points of view -- including both those of men and women, low/upper incomes, occupational groups, and organizations, etc. An interview guide listing the main topics and issues to be covered is sometimes used to focus this discussion, although specific questions are formulated during the interview.

Information from key informant interviews is usually supplemented by information from other sources.

Focus Group Interviews

In focus group interviews, participants discuss ideas, issues, and information among themselves under the general supervision of a moderator. The underlying premise is that group interaction has synergistic effects on participants, producing better information and insights than do individual interviews. The number of participants is limited to facilitate discussion.

Community Interviews

Community interviews take the form of community/village meetings open to all members. Interviews are usually conducted by a team of two or more investigators, who follow an interview guide. Community interviews can also be used to obtain community-level statistical data.

Session 4

Direct Observation

This method involves intensive and systematic observation of a phenomenon or process in its natural setting. It is not, however, as elaborate a method as participant observation, which is used in ethnographic studies. In the study of social and economic phenomena, direct observation usually requires the interviewing of key informants as well.

Informal Surveys

Informal surveys differ from sample surveys in four respects: they 1) focus on only a few variables; 2) use a small sample size; 3) use non-probability sampling; and 4) permit more flexibility to the interviewers in the field. Informal surveys generate data that can be statistically analyzed.

Summarize these data collection methods, checking with participants to ensure understanding of these methods. It is helpful to have a copy of the reference work for this presentation available on the Resource Table for participants.

Close this review by asking participants to share a few creative and effective methods from their experience for gathering sex-disaggregated data.

4. Networking for Information Sources: Participant Exercise

Often significant sex-disaggregated data sets exist in the host country. Other non-governmental organizations, universities, donors, and government ministries usually collect information that can be used for new project design or adaptation. However, the existence of such data sets is often not widely known, and new projects carry out large new baseline surveys.

The exercise that follows will help participants identify specific data sources in their country/organization while illustrating the point that data sets often exist unbeknownst to others who are looking for information.

Prior to the session, designate and label areas of the room for specific sectors (e.g., agriculture, health, private sector). As the exercise begins, present participants with the following task:

Session 4

(NP-4.4)

- Spend 15 minutes thinking about data sources that you are aware of and that are accessible, and how they might be useful to others.
- Write down, according to the following format, by sector, the kind of information available, the form of the data, when it was collected, where to find the data, a contact name and number.

Example:

Agricultural credit, survey of loan recipients 1990, National Cooperative Union; contact: John Smith, tel: 456-7890.

(Write legibly since others will read it during this exercise.)

- Move to the area of the room where your sector is; pass around your listings of information sources; ask questions. When you are finished, move on to other sectors. If not enough time, make plans to meet later! (You have 30 minutes for networking.)

This works best when the mix of participants includes many from outside of the host organization. For a regional workshop, participants can begin by seeking information sources for/from their own country.

When participants have finished, or when no more time is available, re-form the plenary session. Ask participants how this worked for them. Ask for a few participants who have identified data sets that might have application to several sectors, to present them.

5. Summary, Reflection, and Closure of Session (5 Minutes)

Review the main points of the session. Some additional points can be added about when to collect data.

- For new projects, where data are not available for gender analysis, data can be obtained in baseline studies. If obtained as part of the project start-up process (and after project design), decision points should be built into the project so that changes can be made to incorporate the new data.
- All new projects should include collection of sex-disaggregated data in monitoring and evaluation systems.

Session 4

For existing projects, evaluations should also collect sex-disaggregated data. While this will not affect the project being completed, it can provide valuable information to guide future work.

Bridge to the next session and close.

VARIATIONS:

1. An alternate or additional small group exercise is to have participants return to their small groups from the previous day. They review the list of data needs identified for that project, then select 1-2 and discuss how they would obtain the needed data. Specifically, they should discuss what data collection methods would be most cost effective, what kind of financial and human resources would be needed, what problems could be anticipated in data collection, and what strategies could be used to overcome them. The small group work would be followed by a brief report back to the total community.
2. Convening a panel of local resource persons to talk about their experiences and data sources is another effective way to address this issue. The suggestions provided in Session 2 for organizing a donor panel would be appropriate for this session as well.
3. Identify experts within the organization or the country on one particular data collection method. The expert presents a "How To" session on that method. The trainer should work with the guest lecturer to prepare him/her for the presentation. The presentation could be followed with an adaptation of the small group work used above.

Session 5

SESSION 5: STRATEGIES TO OVERCOME BARRIERS TO WOMEN'S PARTICIPATION IN DEVELOPMENT ACTIVITIES

TIME: 1 Hour, 15 Minutes

OBJECTIVES: (NP-5.1)

At the conclusion of this session, participants will:

1. be able to identify at least three project features that are frequent barriers to women's participation in development projects; and
2. be able to select strategies for adapting mainstream projects so that key elements of the project incorporate gender considerations and, therefore, do not inadvertently discriminate against, or pose barriers to, the appropriate participation of women.

RATIONALE AND OVERVIEW:

This session is based heavily on sections from the A.I.D. Program Evaluation Report, No. 18, Women in Development: A.I.D.'s Experience, 1973 - 1985, Vol. 1 Synthesis Paper, April 1987, by Alice Stewart Carloni. In particular, the synthesis is used as both a Handout following the session and a visual aid (NP-5.3) during the opening presentation and discussion.

In the Carloni evaluation, it was suggested that gender analysis alone has "little effect on project outcomes unless institutional and other barriers to participation are identified and overcome." The objective of this session, therefore, is to provide practice in the identification of barriers and development of strategies to overcome them. Alternatives for overcoming barriers to women's access to, full participation in, and access to/control of benefits in development programs are presented and discussed briefly in the introductory presentation.

Traditionally, three mechanisms have been used to address gender considerations in projects: development of women-only projects; addition of women's component to larger (therefore "men's") projects; and integration of women into conventional or mainstream projects. According to the A.I.D. Program Evaluation cited above, "gender sensitive (gender analysis with adaptation) mainstream projects appear to be the most effective way of promoting and utilizing women's contribution to socio-economic development."

Thus, this session is designed to look at ways to integrate women into mainstream projects.

Session 5

ACTIVITIES:

1. Introduction to Session

The trainer introduces the session, bridging from the previous session on Information Resources, reviewing the Objectives (NP-5.1) for the session and the Activities. The introduction would also include some information from the rationale and overview.

2. Plenary Discussion (40 minutes)

The trainer begins by describing how the need to identify women-specific strategies (within a mainstream project) can arise:

- ** IN NEW PROJECTS: gender analysis of the baseline situation may indicate that women will be affected by a project, should be included in project activities/benefits, and face gender-related constraints.
- ** IN EXISTING PROJECTS: a project may be having difficulty and gender may be a factor, or monitoring or mid-project evaluations indicate gender issues may have been overlooked and are affecting project implementation.

This session will suggest how to approach these situations and will identify strategies others have used successfully. Note that, in this session, the focus is directly on women vs. gender; it is a session on how to incorporate women once a gender analysis has been carried out. Since the emphasis until this session has been on gender considerations, this point may need to be stated explicitly.

A way of approaching the question of appropriate inclusion of women in new or adapted project design is to address the issues below, which should be put on newsprint as follows:

(NP-5.2)

CONSIDERATIONS IN DESIGNING/ADAPTING PROJECT ACTIVITIES TO ENSURE THAT WOMEN:

- HAVE ACCESS TO PROJECT RESOURCES
- PARTICIPATE IN ACTIVITIES, AND
- RECEIVE INTENDED BENEFITS

Session 5

Briefly explain or describe each of these by providing examples, or eliciting examples from participants. It is helpful to follow up examples by asking the question, "How might these issues affect project outcomes?" It can be noted that lack of direct access to intended benefits, for example, can be a disincentive to participation in project activities. Benefits obtained through a male household head (which is often how women are expected to receive benefits) may be insufficient to encourage participation. Where voluntary labor is needed, as with tree planting, lack of women's participation could impede project success.

Specific project features to consider to ensure women are appropriately incorporated into the project are presented below.

(NP-5.3)

PROJECT FEATURES TO CONSIDER: POTENTIAL BARRIERS TO WOMEN'S PARTICIPATION

- CHOICE OF PROMOTION STRATEGY
- CHOICE OF TECHNICAL PACKAGE
- TIMING AND DURATION OF ACTIVITIES
- DELIVERY SYSTEMS
- LOCATION OF PROJECT ACTIVITIES OR SERVICES
- ELIGIBILITY CRITERIA
- NATURE AND DISTRIBUTION OF BENEFITS

Review these project features, which may be barriers to women's participation, with the participants. (Additional information on each is provided in Section VI.) Because not all may need lengthy explanation, select a few to emphasize. Provide examples as necessary from the "real world." Invite participants to share their experiences about how these project features have affected project effectiveness, as well as strategies they have used to overcome the constraints these project features may pose. Participants usually have many examples they like to share with the group. The trainer can also use the gender analysis case example from Session 3 as a source of examples. This discussion models the small group task in the next exercise.

3. Small Group Task (20 Minutes)

The trainer can present the following task on flipchart paper and answer any questions needed for clarification. Groups may use any project or activity from their experience - one they brought with them, one used in earlier exercises, etc.

(NP-5.4)

SMALL GROUP TASK

1. SELECT A RECORDER/REPORTER FOR YOUR GROUP.
2. FROM YOUR GROUP MEMBERS' EXPERIENCE, SELECT ONE PROJECT (OR PROJECT ELEMENT) THAT HAD DIFFICULTY INCORPORATING WOMEN'S APPROPRIATE/INTENDED PARTICIPATION.
3. IDENTIFY ONE OR TWO BARRIERS/CONSTRAINTS YOU THINK ARE MOST ACTIVELY AFFECTING THAT INTENDED LEVEL.
4. EXPLORE THE NATURE OF THAT CONSTRAINT AND DEVELOP A PROPOSED STRATEGY TO REDUCE OR REMOVE IT.
5. PREPARE TO PRESENT A VERY BRIEF SUMMARY OF YOUR GROUP'S WORK TO THE TOTAL COMMUNITY.

YOU HAVE 20 MINUTES FOR THIS TASK.

4. Small Group Reports (15 Minutes)

With the limited time for reports, the trainer will urge brief summaries of the groups' work, and will highlight the barriers and the proposed strategies. Note that this is a first try at identifying barriers and strategies. On the following day, all participants will have an opportunity to explore their own problems of incorporating gender into an ongoing activity.

5. Reflection, Summary, Close of this Session, and Bridge to Session 6

At the close of this session, distribute Handout, Project Design and Implementation Alternatives: (Microenterprise, Housing, Vocational Training, and Agriculture).

Session 6

SESSION 6: MANAGING THE PROCESS

TIME: 1 Hour

OBJECTIVES: (NP-6.1)

At the conclusion of this session, participants will:

1. have identified where gender issues should be included within their organization's program development process (e.g., project staff recruitment, scopes of work, etc.);
2. have identified assumptions about how gender issues will be considered in the programming process; and
3. have briefly discussed for one stage in the programming process alternative strategies for incorporating gender considerations.

RATIONALE AND OVERVIEW:

This session is a brief review of how gender considerations can be integrated into the organization processes of program design and implementation (as distinct from development issues related to gender). Many development practitioners would like to be involved with gender-sensitive programs, but they do not know where gender fits in documentation and programming procedures. This session is designed to help participants identify where gender issues should be integrated into organizations' systems and procedures.

The core piece of this session is the programming process of the sponsoring institution; information about that process should be obtained during the pre-workshop planning period and a diagram of the process prepared. A flipchart of the organizational process is used to assist participants to visualize the process under discussion. If the workshop is multi-organizational, a standard project design process (e.g., country needs assessment and plan, project concept paper, project design, funding, implementation, monitoring, and evaluation) can be used as a starting point.

Often participants are unaware of the various places into which gender considerations should be factored, and this session often produces some "aha's."

Session 6

ACTIVITIES:

1. Session Opening, Review of Objectives (NP-6.1) and Activities (5 Minutes)
2. Plenary Discussion of the Development Programming Process (50 Minutes)

Using information provided by the host organization, the trainer begins this session with a review of the development programming process. This may be old information for some participants, but it is important that it be presented so that everyone has the same understanding of the process under discussion.

As the review begins, points in the process where gender should be considered will be revealed. For example, in developing country plans, background data should be disaggregated by sex; it should include both men's and women's participation in agriculture or small-scale enterprises. Participants can be asked how to ensure that the analysis does incorporate women as well as men. Responses might include 1) an organizational policy that all data be disaggregated by sex; or 2) consultant scopes of work that explicitly address gender issues.

After a few examples from the trainer, participants usually begin to provide their own, and this often becomes a learning experience for the trainer as well!

Continue this review, focusing on a few areas and developing strategies in detail. Keep the discussion light and lively. It is important that many people participate, because it provides an opportunity for ideas of individuals to accrue some legitimacy because of their discussion in this forum.

3. Summary, Closure, and Bridge to the Next Session (5 Minutes)

The trainer can use the flipchart to briefly summarize the points identified in this session where gender can be introduced into the programming process. Note that this may have provided ideas for the next session, in which they will work individually and in groups to develop specific strategies for incorporating gender issues into projects, programs, or other activities back home.

Session 7

SESSION 7: INDIVIDUAL APPLICATION

TIME: 2 Hours, 30 Minutes

OBJECTIVES: (NP-7.1)

At the conclusion of this session, participants will:

1. have analyzed, individually and in consultation groups, the development materials they brought to the workshop for gender issues, additional baseline information needed, and strategies for adaptation;
2. have gained additional skills in identifying project activities and outputs which should reflect gender considerations previously identified;
3. be able to select strategies for designing/adapting mainstream projects so that key elements of the project incorporate gender considerations; and
4. have begun to develop basic criteria for distinguishing projects and programs which have adequately considered gender from those which have not.

RATIONALE AND OVERVIEW:

This session provides an opportunity for individual participants to work on development materials, projects, ideas, activities, etc., which they have brought to the workshop to analyze, adapt, if necessary, and integrate gender considerations more effectively. This session also offers an opportunity to work in consultation groups with peers as they do this work, and it has proven to be one of the most popular for participants in previous workshops.

Ideally, the consultation groups will be trios. This number provides both the most effective consultation pattern for the usual participant in terms of time for both significant interaction and individual work. The groups may be formed by self-selection, or be designated by the trainers according to the focus of the content or sector interest.

ACTIVITIES:

1. Plenary Session - Introductory Presentation and Discussion (15 Minutes)

The primary responsibilities of the trainers in this session are to provide clear task instructions to the individual participants and the consultation trios, to assist the trios to manage their time carefully, and to provide consultation in gender considerations or other technical expertise when, or if, requested.

Open the session with a review of session objectives (NP-7.1) and a quick overview of the session. Move quickly to the task assignment.

2. Individual/Group Work on Development Materials

(NP-7.2)

INDIVIDUAL AND CONSULTATION GROUPS' TASK

PART 1: INDIVIDUALLY, YOU HAVE 15 MINUTES TO:

1. **CLEARLY DEFINE THE PROBLEM/TASK YOU WISH TO STUDY**
2. **IDENTIFY:**
 - **GENDER DIFFERENTIAL ISSUES**
 - **ADDITIONAL BASELINE DATA NEEDED**
 - **STRATEGIES FOR ACCOMPLISHING THIS**
3. **IDENTIFY 2 OTHER PERSONS TO WORK WITH YOU AS YOUR 'CONSULTANTS', AND WHAT HELP YOU WANT FROM THEM**

PART 2: IN CONSULTATION TRIOS, 20 MINUTES/PERSON

1. **CHOOSE 2 PEOPLE AS 'CONSULTANTS'**
2. **EACH PERSON IN TURN, TAKE:**
 - **10 MINUTES TO PRESENT YOUR ANALYSIS OF NOS. 1. AND 2. ABOVE AND STATE THE HELP YOU WANT FROM YOUR CONSULTANTS**
 - **10 MINUTES FOR THE CONSULTATIVE ASSISTANCE (PERSON BEING CONSULTED TAKES APPROPRIATE NOTES FOR LATER REFERENCE)**

Session 7

3. Reports of Consultation Groups and Individual Applications (1 Hour)

Though one hour has been allowed for this reporting time and discussion, it more commonly is reduced by demands for additional time in the consultation trios. It is impossible, given the time limitations, to hear from every individual and to process the consultative interactions, and it is often a very rich experience to hear from as many participants, who have found this time to be valuable to them in their actual work context, as possible. These reports often provide the opportunity for some rich interaction and discussion in the total community.

4. Summary, Bridging to Session 8: (Gender Implications in the Policy Environment) and Close of this Session

Session 8

SESSION 8: GENDER IMPLICATIONS IN THE POLICY ENVIRONMENT

TIME: 3 Hours

OBJECTIVES: (NP-8.1)

At the conclusion of this session, participants will:

1. have examined gender-differentiated implications for project design of higher level objectives found in organizational mission statements;
2. have used factors of labor, resources, income, and expenditures in program/project analysis to discover where gender is a significant variable in the documentation process; and
3. have worked through an analysis of constraints and opportunities afforded by gender differences in roles and responsibilities to improve the documentation process.

RATIONALE AND OVERVIEW:

The relevance of gender as a significant issue in the achievement of project goals and purposes may not be automatically clear. This is most often true in projects and programs that do not work directly with people, as in institutional development programs or the development of major grain storage facilities. However, when the larger development objectives of the organization are considered, the reason for taking gender issues into account becomes apparent.

This session uses the host organization's overall mission statement as a vehicle for considering how gender cuts across the various levels of development programming. The session borrows from the structure of A.I.D.'s Logical Framework (logframe), which is A.I.D.-specific, but can be easily adapted to the project/program design process of other organizations.

ACTIVITIES:

1. Introduction (5 minutes)

The trainer bridges from preceding sessions by noting that for many people it is relatively easier to identify gender issues at the PROJECT level than at the POLICY or PROGRAM level. The Exploratory and Conclusion-Drawing Factors seem at first glance to be more appropriate for baseline documentation at the household level. Check for participant experience in this regard. Explain that in this session, the policy level gets its share of scrutiny for gender issues. Although wider level organization documents may have limited

Session 8

people-level content, planning in the absence of understanding what people do--including gender roles and responsibilities--will constrain the effectiveness of development programs. The trainer should present the objectives and review the activities for this session.

2. Lecturette and Group Discussion: Gender Implications of the Policy Environment (30 minutes)

The trainer presents objectives (NP-8.1) and schedule of activities for this session. Building on the earlier session, "Managing the Process," the trainer reviews the host organization's programming cycle. Next, read (and put on newsprint) all or part of the organization's overall mission statement. Note that it is (typically) very broad in scope. This sets the context then for describing the organizational hierarchy of objectives. That is, objectives are very specific at the project level and become more global as they address the development needs of a wider and wider audience. So, at the base, there is a project with specific purposes to be achieved (e.g., increased grain production). The project addresses a larger country development goal, to be achieved over a longer period of time, which contributes to achievement of the organization's mission. This is illustrated in NP-8.2 below.

(NP-8.2)

OVERALL GOAL:	ORGANIZATIONAL MISSION STATEMENT (long-term goals)
COUNTRY LEVEL GOAL:	COUNTRY STRATEGY/PLAN GOALS (medium-and long-term goals)
PROJECT LEVEL:	GOAL AND OBJECTIVES (short- and medium-term goals; short-term objectives)

Goals and purposes at the various levels of programming are complementary, with each project contributing to achievement of goals at the larger country and world-wide levels. Further, this process is continually evolving with backwards and forwards "linkages" between the various levels. Thus, as projects and programs achieve their objectives, larger goals at the country organizational mission levels are revised. And while sometimes organizational mission statements modify with social, economic, and political changes in the United States, overall, the mission of helping low-income people usually remains.

With this background, read again the organization's mission statement. In nearly all cases, the trainer can note that the mission statement does not indicate that efforts to improve the quality of life should be restricted to one sex. However, one sex may represent the group requiring the most assistance: women are disproportionately represented among the poor, the uneducated or undereducated, and malnourished.

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The trainer can add statistics here from the country hosting the workshop (e.g., number of female-headed households, per capita income, education levels, etc.) to illustrate the proportion of males and females in the categories above.

Next, present 1-2 goals from the organization's country strategy or similar document. Reviewing the country goal statement and its connection to the organization's overall mission statement, invite participants to identify ways that gender considerations might be important in this connection.

Finally, make the connection between the overall mission, country missions, and project goals. Review a few kinds of projects to illustrate how they operationalize larger goal statements. Ask for examples from participants or provide your own. Health, agriculture, and natural resource management projects that have clear people level impact would be appropriate as the first example. The second example should draw from projects that work at the intermediate level, such as institutional development or research projects. In this case, the gender issues might not be immediately obvious. Illustrative project activities in educational institution development projects include ensuring course content addresses technology/information needs for women's entrepreneurial or agricultural activities, or identifying barriers to women's access to institutional resources such as education or jobs. Connect these back to the country and overall mission goals.

While the gender issues may appear obscure, there is almost invariably a connection. Some examples follow: given the disproportionate numbers of women among food producers, including information about women's crops in agricultural colleges makes sense, as does increasing the number of women in agriculture technology transfer in cultures that constrain interaction between unrelated males and females. Given the growing number of female-headed households, increasing credit opportunities for them can be an effective development strategy.

In terms of opportunities provided by gender differences, men and women frequently grow different crops; targeting specific projects to their crops makes sense. Being aware of information networks among both men and women could speed transfer of information related to health and family planning.

3. Large Group Practice on Gender Considerations Among Levels of Programming (25 minutes)

To illustrate these linkages between country goals, policies, programs, and projects, take one example and follow it from the overall mission statement to project objectives, as in the following illustration.

Session 8

(NP-8.3)

OVERALL MISSION: To improve the well-being of rural families

COUNTRY GOAL: To increase food security

SUPPORTING POLICY REFORM: Develop options to eliminate consumer subsidies on food and other cheap food policies. Often governments will pay farmers less than market value for foods to maintain an artificially low price for urban consumers. This does not encourage increased production.

SUPPORTING PROGRAM: Stimulate grain production and marketing; or improve the capacity to conduct research on higher yielding varieties.

POSSIBLE PROJECTS: a) training to strengthen agricultural extension services or the agricultural colleges; b) technical assistance to town/regional/district planning units to strengthen local markets; c) loan guarantees to agricultural credit institutions so they can broaden their lending to include low-income men and women and ancillary businesses such as transportation network ventures.

After presenting this scenario, ask participants to list some gender issues that dissect these levels of development programming. There is not a "right" answer, only consideration of how gender might cut through development programming. Some sample questions follow.

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(NP-8.4)

COUNTRY GOAL: Is the food security issue the same for both males and females? What are gender-based differences in food production, purchase, storage, transport, sale, etc., from the household to the national levels? Is financial responsibility for purchase and ability to buy the same for males and females?

POLICY: Who buys grain in rural and urban areas? What are the gender differences in income from grain production and marketing? How will changes in subsidies affect men and women producers and consumers differently? Who has been selling to the government agents? Groups, individuals? Who belongs to the groups? How do individual men and women relate to these groups? (This may differ by region, class, ethnicity, etc., as well as by gender, of course). Who has benefited from current policies?

PROGRAM: If males and females both produce and sell grains, how will the decision to implement the policy by stimulating grain production and marketing affect them differentially? How will this decision lead to increased food availability? Is the measure helpful to both male and female producers? Are effective incentives to increase production the same for women and men?

POSSIBLE PROJECTS: Credit: if women are producers, will credit programs enable individuals or groups of women to obtain funding to purchase seeds, fertilizers, and transport so they can market their own crops? Institutional development: is research and extension currently reaching women's crops? How are women's agricultural needs conveyed to extensionists and researchers?

Close this portion of the session by reviewing the main points of the presentation; then lead into small group exercise.

(We would recommend a coffee break here prior to starting the exercise.)

4. Small Group Exercise (60 minutes)

Hand out a synopsis of a typical country strategy plan for the host organization; this should include a one paragraph each (maximum) description of one mission goal, along with at least one project and one program summary. Include also a 1-1 1/2 page background description of the country that provides sex-disaggregated data on educational, formal and informal sector employment, roles in agriculture, health, migration female-headed households, etc. Review these with the participants.

(NP-8.5)

SMALL GROUP TASK

** Review the country goal. Identify at least 3 possible gender considerations related to achievement of that goal. The four exploratory factors in gender analysis and the background information provided for the case example in Session 3 are resources for this exercise.

** Using the 3 gender considerations at the goal level, identify at least one way each how those gender considerations might affect the selection, design, and implementation of projects and programs.

** Identify data needed to complete this assessment.

5. Small Group Reports (35 minutes)

It is not necessary to get a complete report from each group for this task. Many similarities are likely to occur. The trainer should go over the questions in the task one by one, comparing selected responses from each of the groups for similarities and differences. Again, it is important to stress that there are no correct answers in this exercise. More important is the discussion of how gender fits in the vertical linkage between specific projects through programs and policies at the national level to the organization's world-wide mission.

6. Summary Reflections and Session Closure (5 minutes)

TRAINER NOTES:

Participants have often expressed much support for this session because it reviews for them the organization's world-wide goal, which many have forgotten if they ever knew, and because it fosters a discussion of development issues which many people are too busy to ever engage during their normal work.

Session 9

SESSION 9: PLANNING FOR ACTION

TIME: 2 Hours

OBJECTIVES: (NP-9.1)

At the conclusion of this session, participants will:

1. have developed an action plan for incorporating gender considerations into a component of their work; and
2. have identified resources needed for implementing their action plan.

RATIONALE AND OVERVIEW:

This session builds on the previous ones and provides an opportunity for participants to plan a strategy to incorporate gender considerations into some aspect of their work back home. Working individually, or in teams from the same sector or office, they will use simplified versions of an action planning model to develop action steps within an appropriate time frame. If additional data are needed, they will plan the how, where, and at what level, to gather the needed sex-disaggregated information.

This session was designed to provide that transitional experience from the training, as well as one additional way to assist participants to apply and integrate some of the awareness and basic skills in gender analysis in practical ways.

ACTIVITIES:

1. Plenary Session - Introductory Presentation, Discussion, and Task Instruction (15 Minutes)

The primary task of the trainers is to clarify the objectives (NP-9.1) of the session, to provide the appropriate data analysis and action planning models, and to clarify the task assignment. Trainers may certainly serve as process and technical consultants in gender considerations and the action planning process with the participants while they are working on the assignment. Additional clarifications and support may also be appropriate, though we have discovered that this is an opportunity for participants to utilize their peers in this process with even more future benefits.

A handout of the Action Planning Model is included in this manual in Section VI. The trainer may want to select an alternate model. These models may also be reproduced on flipchart paper to be used in the

Session 9

introductory presentation. Individuals may do part of their work on flipchart paper, or may use the handout forms.

2. Individual Action Planning Work (1 Hour, 45 Minutes)

The content for individual work depends on which of the "problems" of incorporating gender considerations the participants have brought with them. Projects, from the concept paper to evaluation, have been the primary content for this exercise. Other possibilities have been developing a strategy for assisting personnel to institutionalize gender considerations in every stage of the development process, developing a Scope of Work for consultants to incorporate gender considerations and sex-disaggregated data, etc.

Perhaps the most difficult part of this exercise is to assist the participants to identify "solvable problems" in order to increase the usefulness and practical benefits of the task. At this initial individual work stage of the task, participants may want, and benefit from, consultation with peers or training staff, and this opportunity can be stated during the task assignment.

The practice with these Individual Action Plans has been to provide materials for making an original and one copy of the Plan developed in this exercise. Participants have kept one copy for their reference. The second copy has been handed in with their Final Evaluation in a sealed envelope with their mailing address. This copy was designed only for the individual's own accountability, and has been mailed back to the participant in six months from the close of the training along with other follow-up communications.

(NP 9-2)

ACTION PLANNING TASK

Option One

1. Discuss and list the problem or challenge facing you in incorporating gender;
2. List the goal or objectives you need to set in order to correct the problem or meet the challenge; and
3. List the action steps needed, along with who, when, and the resources needed.

Option Two

Using a planning model of your own choosing, develop an Action Plan to increase the incorporation of gender considerations in your work or in a specific task.

Session 9

3. Reports of Individual Action Plans, Discussion, and Summary (30 Minutes)

It will not be possible, nor would it be effective, or even desired, to hear from all participants regarding their action plans. Reports on the process of planning itself are as valuable as the specifics of the action plan. However, reports by willing, even enthusiastic, volunteers may be very valuable synergistic learning for the total community, and may lead to valuable discussion.

4. Close of this Session and Bridge to the Workshop Summary and Evaluation

Session 10

SESSION 10: WORKSHOP SUMMARY, EVALUATION, AND CLOSURE

TIME: 1 Hour, 30 Minutes

OBJECTIVES: (NP-10.1)

At the conclusion of this session, participants will:

1. have reviewed the training workshop content and process and discussed ways of incorporating the training in their work situations;
2. have provided written evaluations of the workshop sessions; and
3. have expressed whatever closing comments necessary to each other and the training staff, and prepared for their return to home and work.

RATIONALE AND OVERVIEW:

The close of a training workshop is as important as its beginning. Participants and trainers have been together for three days of intensive work and interaction. Many have created new friendships and relationships, even with colleagues with whom they work every day, and it is important to acknowledge and celebrate this fact.

The summary provides a reflective overview of the new content awareness and process for gender consideration and reinforces the process of the training. Experience with this training model and feedback from participants indicate that **both a summary and an informal oral evaluation at the close of each day are appreciated and result in more accurate feedback and learning.** (See Section VI for sample written evaluation forms that have been used.)

ACTIVITIES:

1. Workshop Summary (15 Minutes)

The trainer opens this session with a review of the activities and schedule for this session, some adaptation of the Rationale and Overview above, and then very briefly reviews the Training Workshop Objectives and Summary Schedule, using the Flipcharts prepared for the Opening Session as a visual aid for the workshop process and content, and touching on difficult, exciting, and humorous moments in the training event.

Session 10

2. Workshop Evaluation (45 Minutes)

This portion of the closing session may take less time than has been allocated here. The trainer emphasizes the value and use of the written evaluation and encourages the participants to be as candid and specific as possible in their feedback. Inform them how much time they will have to complete the form, where to turn them in, and what will follow.

3. Closing Activities (30 Minutes)

This is a time for expressions of appreciation from the training staff for the good work by the participants and gratitude to the local coordinator(s) and host(s). Participants should be invited to express any appreciations they desire also.

If local authorities are present, especially those who opened the workshop with welcoming and/or introductory remarks, this is the time for them to make some brief closing remarks.

The last structured exercise of the workshop should be an opportunity for persons to say whatever they wish to one another. This may be done in the total community by the trainer managing this session asking something like -- "Does anyone have anything they would like to say before we leave this setting?". Or the staff may design some activity appropriate for the specific participant and staff population as a way of closure.

SECTION V - RESOURCE DOCUMENTS

RESOURCE DOCUMENTS

Office of Women in Development Resources & Definitions

A.I.D. Program for Women in Development - A User's Guide to the Office of Women in Development, FY 1990.

A.I.D. Policy Paper - Women In Development: U.S. Agency for International Development, October 1982.

Concepts, Terms, and Definitions, PPC/WID, 1989 (mimeo).

What Happens When Gender Is Considered/When Gender Is Not Considered in Economic Development Activities - A Few Positive and Negative Examples.

What WID Is/Is Not - Some Myths and Facts About Women in Development.

PRIVATE SECTOR DEVELOPMENT

General

Private Enterprise Development: Gender Considerations, Arthur Young, for the Bureau for Private Enterprise, 1988.

Improving Women's Access to Credit in the Third World: Policy and Project Recommendations (Margaret A. Lycette, International Center for Research on Women).

Women and Export Manufacturing: A Review of the Issues and AID Policy (Susan Joeckes with Roxana Moayedil).

Women in Rural-Urban Exchange: Implications for Research and Intervention Identification- Executive Summary (Jeanne Downing & Jennifer Santer, February 3, 1989).

Women's Changing Participation in the Labor Force - A World Perspective, T. Paul Schultz.

Women's Non-Access to Credit: Problems and Policies (Dr. Krishna Ahooja-Patel).

Small and Micro-Enterprise Development

Cornell/International Agricultural Economics Study Assisting Informal - Sector Microenterprises in Developing Countries (Katherine E. Stearns).

Resource Documents

Issues in Small-Scale Enterprise, Maria Otero for Office of Women in Development, 1987, Gender Manual Series.

Micro-Level Strategies for Supporting Livelihoods, Employment, and Income Generation of Poor Women in the Third World - The Challenge of Significance (Katherine McKee).

Project Design and Implementation Alternatives: Microenterprise. (Excerpt from "Gender Issues in Latin America and the Caribbean," International Center for Research on Women).

DATA COLLECTION

Conducting Group Interviews in Developing Countries, A.I.D. Program Design and Evaluation Methodology Report No. 8, by Krishna Kumar, Bureau for Program and Policy Coordination, 1987.

Current Practice and Immediate Needs for Collection and Presentation of Performance & Impact Data, April 1988.

In-Country Sources of Data, Office of Women in Development (mimeo, 1988).

Indicators of Household Income for Use in the Evaluation of Agricultural and Rural Development Projects (Beatrice Rogers, June 1988).

Indicators for Assessing Integration of Gender Considerations into AID Activities, Office of Women in Development (mimeo).

Indicators to Monitor and Track Progress of Women In Development Policy Implementation.

Rapid, Low-Cost Data Collection Methods for A.I.D., A.I.D. Program Design and Evaluation Methodology Report No. 10, by Krishna Kumar (Center for Development Information and Evaluation), 1987.

EDUCATION

Gender Issues in Basic Education and Vocational Training, by Dr. Mary B. Anderson; The Gender Manual Series, 1986.

AGRICULTURE

Gender Issues in Farming Systems Research and Extension: A Survey of Current Projects - Executive Summary (S. Poats, J. Gearing, and S. Russo).

Resource Documents

Women and Agribusiness: A Review of AID Projects (Nadine R. Horestein).

Gender Issues in Agriculture and Natural Resource Management, for the Office of Women in Development. Summary of Development Experience - Encouraging Female Participation in Irrigation Projects.

REGIONAL WID ISSUES

Gender Issues in Latin America and the Caribbean, Karen White, Maria Otero, Margaret Lycette and Mayra Buvinic, International Center for Research on Women, Prepared for the Bureau for Latin America and the Caribbean, 1986.

GENERAL WID

Integrating WID or Restructuring Development - Executive Summary (Mary Anderson & Marty A. Chen).

Making the Case for the Gender Variable: Women and the Wealth and Well-Being of Nations (Condensed and excerpted by Ron Grosz).

Making the Case for the Gender Variable: Women and the Wealth and Well-Being of Nations (Rae Lesser Blumberg, University of California - San Diego - Jan. 1989).

Women in Development: A.I.D.'s Experience, 1973-1985. Volume 1, Synthesis Paper.

Women in Development: A.I.D.'s Experience, 1973-1985, Vol II: Ten Field Studies, A.I.D. Working Paper No. 131. Paula O. Goddard, Editor. (Center for Development Information and Evaluation, A.I.D.).

STRUCTURAL ADJUSTMENT AND NON-PROJECT ASSISTANCE

Making Adjustment Work: A Gender Perspective - International Center for Research on Women (Lisa McGowan, Oct. 27, 1988).

Development Assistance: Shifting to Sectoral Cash Transfers in Latin America (Philip Boyle, Nov. 11, 1988).

Gender Aspects of Labour Allocation during Structural Adjustment, Paul Collier.

The Socio-Economic Effects of Structural Adjustment on Women (Philip Boyle, October 5, 1988).

Resource Documents

Women, Structural Adjustment and Transformation: Some Lessons and Questions from the African Experience. Uma Lele.

Women and Structural Adjustment, Paul Collier, Unit for the Study of African Economies, Oxford University, February, 1989.

Women and Structural Adjustment by Ron Hood, September, 1989.

Women and Structural Adjustment in Zaire. Brooke Schoepf and Walu Engundu with Claude Schoepf and Diane Russell.

Women and Structural Adjustment - Part I: A Summary of the Issues (Susan Joekes, Margaret Lycette, Lisa McGowan and Karen Searle).

Women and Structural Adjustment - Part II: Technical Document (Susan Joekes, Margaret Lycette, Lisa McGowan and Karen Searle, April 18, 1988).

Women Traders in Ghana and the Structural Adjustment Programme. Gracia Clark and Takyiwaa Manuh.

Fertilizer Subsidy Removal Programs and Their Potential Impacts on Women Farmers in Malawi and Cameroon, Christina Gladwin.

HEALTH

Time Costs and Time Savings to Women of the Child Survival Revolution, Joanne Leslie.

Weathering Economic Crises: The Crucial Role of Women in Health (Joanne Leslie, Margaret Lycette, and Mayra Buvinic, International Center for Research on Women, May 22, 1986).

Women's Time: A Factor in the Use of Child Survival Technologies? (International Center for Research on Women).

FRAMEWORKS FOR CONSIDERING GENDER IN DEVELOPMENT ACTIVITIES

Agency for International Development, Office of Women in Development, The Gender Manual Series:

- Gender Issues in Small Scale Enterprise, by Maria Otero, edited by Laurene Semenza and Paola Lang, Robert R. Nathan Associates, Inc., 1987.
- Gender Issues in Basic Education and Vocational Training, by Mary B. Anderson, 1986.

Resource Documents

- Gender Issues in Latin America and the Caribbean, by Karen White, Maria Otero, Margaret Lycette and Mayra Buvinic, International Center for Research on Women, 1986.
- Gender Issues in Agriculture and Natural Resource Management: Guidelines for Project Design, by Sandra Russo, Jennifer Bremer-Fox, and Laurene Graig, Robert R. Nathan Associates, Inc., 1988.
- Agency for International Development, Center for Development Information and Evaluation, Women in Development: A.I.D.'s Experience, 1973-1985, Volume I, Synthesis Paper, by Alice Carloni, 1987.
- Agency for International Development, Office of Women in Development, The Gender Information Framework, by Virginia Caye and Alfred Rollins, 1988.
- Agency for International Development, Bureau for Private Enterprise, Private Enterprise Development: Gender Considerations, by Sydney Lewis, Arthur Young, Inc., 1988.
- Agency for International Development, Office of Women in Development, Gender and Adjustment (draft), Ron Hood, Mary Altomare, Lawrence Haddad, and Martha Starr-McCluer, The MayaTech Corporation, 1991, selected pages.
- Feldstein, Hilary Sims and Susan V. Poats, editors, The Population Council Gender and Agriculture Project, Gender Analysis in Agriculture, Vol. I and Vol. II, West Hartford, Conn., Kumarian Press, 1990.
- Jiggins, Janice, Gender-Related Impacts and the Work of the International Agricultural Research Centers, Consultative Group on International Agricultural Research Study Paper Number 17, The World Bank, 1986.
- Overholt, Catherine, Mary B. Anderson, Kathleen Cloud, and James E. Austin, Gender in Development Projects, West Hartford, Conn., Kumarian Press, 1985.
- Pastizzi-Ferencic, Dunja, Jeannie Ash de Pou, and Christine Lemoine, "Classifying Women's Activities, Three Case Studies: Kenya, Mexico, Nepal", United Nations International Research and Training Institute for the Advancement of Women (INSTRAW), Santo Domingo, Dominican Republic, 1989.
- Randriamanmonjy, Marie, Anita Spring, Susan Poats, Veronica Priddy, Rita Wilmering, and Linda Spink, "Gender Analysis: Incorporating and Implementing Gender Analysis in the FAO Plan of Action," prepared for FAO National Project Directors Briefing, Rome, Italy, 1989 (mimeo).
- Rockefeller Foundation and International Service for National Agricultural Research, Women and Agriculture Technology: Relevance for Research, Volume I - Analysis and Conclusions, Report from the CGIAR Inter-Center Seminar on Women and Agricultural Technology, Bellagio, Italy, 1985, p. 56.

**SECTION VI - REFERENCE INFORMATION: SAMPLE MATERIAL
FOR:**

**SESSION 3 - GENDER ANALYSIS
SESSION 4 - DATA GATHERING
SESSION 5 - STRATEGIES
SESSION 9 - PLANNING FOR ACTION
SESSION 10 - EVALUATION**

SESSION 3: GENDER ANALYSIS

OVERVIEW

Gender analysis is used to identify the roles and responsibilities of men and women which could affect the design and implementation of development programs. It is important at all levels of programming: from people-level projects to overall country strategy development. The process of gender analysis involves looking at four exploratory factors in the baseline situation (the situation the project wants to affect). Analysis of these factors leads to conclusions about gender-differentiated constraints to participation in, contribution to, and benefits from intended development activities. It also identifies opportunities that gender-based roles and responsibilities provide for improving project/program design. Important factors to consider in gender analysis are listed in the box below.

FACTORS IN GENDER ANALYSIS

Exploratory Factors

- ▶ Labor
- ▶ Income
- ▶ Expenditures
- ▶ Resources (access to and control of)

Conclusion-Drawing Factors

- ▶ Constraints
- ▶ Opportunities

These factors are not mutually exclusive; on occasion they will overlap, and not all will be important for all programming. In fact, some will be significant for specific kinds of projects. However, it is important that each be assessed for its relevance to the project under consideration.

Reference Information

It should also be noted that although gender analysis should be carried out for all levels of programming, most of the examples used in the following factor descriptions will focus on household level projects, where gender issues are often most easily identified.

The level of detail in gender analysis depends upon the project purpose. Development resources are increasingly scarce; therefore, collection of data that are interesting but do not contribute significantly to an understanding of what factors will affect project success is unwarranted.

GENDER ANALYSIS: EXPLORATORY FACTORS In this section, the first four factors - the Exploratory Factors - are covered in more detail. Key issues to consider about each factor will be presented, along with some of the research and evaluation results that illustrate why and/or how this factor is important in project design/adaptation. The trainer should use the following discussion of each exploratory factor, along with any of the examples provided for each. A summary table of the four Exploratory Factors and their key issues appears below.

FACTORS	KEY ISSUES
LABOR	Who does what in ▶ Household activities ▶ Agricultural production ▶ Family enterprise activity ▶ Income-earning activities How does the division of labor change throughout the year (seasonality)?
INCOME	What are the primary sources of income? Do the income sources vary during the year? What inputs (credit, technical assistance, etc.) are used to earn income?
EXPENDITURES	Do men and women have individual financial responsibilities? Who pays what?
RESOURCES	Who has access to and who controls resources such as labor, income, education, training, credit, etc.?

Reference Information

EXPLORATORY FACTOR: LABOR

KEY ISSUE: Who does what in household activities; agricultural production, family enterprise activity, extra income-earning activities?

This will often be the starting point of gender analysis: being aware of who does what in the situation the project will affect. This information is often the first step in identifying the target audience for a project; it is important to ensure that resources are targeted to the right person(s) to achieve project objectives.

For agricultural and natural resource management projects, planners will want to know the division of labor among and within specific crops or natural resources: who is responsible for rice, maize, vegetable production? Within crops, who plows, plants, weeds, fertilizes, stores, etc.? Who uses the crops and for what purpose? This information will be followed through the analysis to assess who controls the use of the crop, clarifying the relationship between responsibility and benefits.

For enterprise development activities, is family labor included in enterprise accounts? Who is responsible for bookkeeping; for cleaning and repairs; for product finishing and packaging; for product sales?

For projects that affect day-to-day activities, who is responsible for household activities? Women usually have household and family responsibilities including fuel and water collection, food preparation, child care responsibility, etc. This information needs to be considered, because new activities for women in the form of "projects" often increase an often already overburdened work day.

CASE EXAMPLE: Northeast Thailand Rainfed Agricultural Development

The objective of this project was to increase rice production by the introduction of power tillers and the use of a nitrogen-fixing crop. Individual farms were to carry out their own trials of new technologies. Men were assumed to be principal farmers and were trained to carry out crop trials. However, men had outside income sources and were frequently away from the farm. Women were not informed about the research - even those whose husbands were present. The project experienced problems: power tillers were not used and the nitrogen-fixing crop was not planted. Also, some women, whose work would increase because of the new trials, pressured their husbands to drop out.

Reference Information

EXPLORATORY FACTOR: LABOR

KEY ISSUE: How does the division of labor change throughout the year (seasonality)?

Where male and female labor contributions for their own or community benefit are incorporated into project design, knowledge of seasonal labor patterns by gender can be critical. This information will be especially important for agricultural and natural resource management projects.

CASE EXAMPLE: Agri-Business in Bolivia In a project to develop a citrus canning factory in Latin America, planners discovered too late that women - on whose labor they were counting for factory jobs - worked in citrus groves harvesting at the same time their labor was needed for processing. They were unable to work in the canning factory, and the factory was unable to start on time because of a labor shortage.

CASE EXAMPLE: Soil Conservation in Kenya This project to build soil terraces to prevent soil erosion relied on women's voluntary labor for terrace construction. Original project scheduling did not take into account women's seasonal agricultural labor requirements; it scheduled soil terrace construction for the traditional harvest time. The resulting labor bottleneck prevented utilization of women's labor. The project came to a standstill until it was redesigned to take into account labor availability. Women's labor contribution to the project - after the redesign - was valued at over \$2 million.

EXPLORATORY FACTOR: INCOME

KEY ISSUE: What are the primary sources of income?

In most parts of the world, women have traditionally made significant contributions to family income, either through cash earned, cash savings or self-provisioning, which represents family income. Women's economic contributions to the household have been underacknowledged for several reasons. Often coming in small amounts, women's income has sometimes been invisible. In Peru, for example, early national census surveys identified 25-30% of women as economically active. More recent surveys showed a sharp decline - down to 6% - which seemed unlikely in the face of Peru's recession, inflation, and the need for more cash income.

On reflection, researchers reviewed the census questionnaires. In earlier surveys, women had been asked the question, "What did you do last week, last month, six months ago?" to identify their occupation. In more recent census surveys, women were asked the question, "What is your occupation?" Because of cultural norms which give higher status to households where women do not work outside the home, women listed their occupation as "housewife," despite employment in food processing, crafts, or other sectors.

Reference Information

Another reason cited for not taking women's income into account is that women are constrained, often by culture, in their ability to respond to economic incentives. It is sometimes suggested that efforts to increase men's income can be more cost effective. However, even women with very strict cultural constraints may provide income to the family.

CASE EXAMPLE: Marketing by Nigerian Women in Seclusion It is commonly assumed that Muslim Hausa women in Nigeria, many of whom live in total seclusion, do not earn income. In fact, many women manage grain distribution and sales networks from their homes using children and male relatives. It is they who plan sales, design and manage marketing strategies, keep records, etc.

As well, women are said to be less productive than men, though few studies have examined the relative productivity rates of men and women. The most frequently cited study in this area was carried out by Mook in Kenya. He noted that when men's educational, technological, credit, informational and other advantages were factored out, women farm managers were at least as productive as men and perhaps more so, having yields as high or higher than men with similar levels of education and access/use of inputs. Results of a more recent study follow.

CASE EXAMPLE: Road Construction and Marketing in Cameroon In Southern Cameroon, a road was built that connected a rural village to a larger one with a bigger market where higher prices for fruits and vegetables could be obtained. When road usage was evaluated, it was discovered that both men and women had increased usage (and increased vegetable production). However, more women - already working 60 hours per week - than men added another several hours to their workweek, to carry their vegetables to the more distant market to get higher prices offered there.

Reference Information

Because of the growing number of female-headed households, the rapid monetization of national economies that require more cash for survival, and the increasing dependence on women's income to survive economic adjustment programs, women's income is increasingly acknowledged.

Therefore projects/programs/policies designed to raise incomes need to assess gender differences in ability to participate in project/program activities and to receive benefits; awareness of gender considerations in such activities is also needed to avoid adverse impacts on female-headed households. Consideration of this factor is especially important in private sector development projects, as well as in agricultural projects.

EXPLORATORY FACTOR: INCOME

KEY ISSUE: Do income sources vary during the year?

Women's and men's incomes are not only derived from different sources, but in many cultures, women's is more diverse and is earned throughout the year. Women typically obtain income from handicrafts, processed food, sale of surplus vegetables/grains, seasonal wage labor - the production of which takes place at different times of the year.

Women's earnings are often the only available income during the "hungry" season before harvest, and because this income is not tied to one source (one cash crop or a full-time job), it often saves the family in times of drought or recession. Men's income, in contrast, is typically derived from wage labor, employment, export crop agriculture, livestock, and/or other more formal sector sources.

More and more women are entering the formal labor market, especially in export processing zones where they work in fruit and vegetable packing/processing plants, textile factories, and pharmaceutical firms. However, this kind of employment is still considerably less frequent for women than men.

Knowledge of men's and women's income sources - and how such income is obtained over seasons - is important for planning both macro and micro level strategies to increase incomes; such knowledge is also important to avoid unintended adverse effects on a family member's income.

EXPLORATORY FACTOR: INCOME

KEY ISSUE: What inputs are used to earn income?

Input in this sense is not restricted to agricultural inputs such as fertilizer and pesticides; it also includes credit, technical assistance, and other contributions to earned income.

Women and men generally have different levels of input usage, with women using far less. For example, women and men generally have different levels of credit (women's credit is typically in small amounts and obtained through informal networks). In agriculture, women typically use

Reference Information

few purchased fertilizers, etc. In all economic endeavors, women usually have less access to technical assistance. Because of this, in part, women's productivity appears to be less than men's.

Agricultural subsidies can have significantly different effects by gender. Subsidies, which are often provided to promote export crop production, can lead to a decline in food crop production. Women represent a high proportion of food crop producers. Surpluses are sold, providing a significant source of income for them and their family -- albeit in small doses throughout the year.

Policies that promote export crops such as cotton and coffee by providing subsidies on fertilizers or seeds, extension assistance or other incentives, may result in male household heads taking away the wife's food producing fields for use in export crop production. This can increase her labor requirements on his fields while decreasing her production. Ultimately, the woman's income derived from surplus sales of her crops is decreased. Subsidies, then, need to be planned with an understanding of potential impact on all family members' income - both cash and in the form of food for consumption. Agricultural research has similar gender considerations.

CASE EXAMPLE: Rice Research: More Rice, Less Income for Women A rice research project in the Philippines resulted in new varieties that were fast growing and early producers. Plant breeders did not explore other uses of the rice plant. The husbands were given the proceeds from the rice crop. Previously, women had made placemats and other crafts from the rice husks and stalk. With the new varieties, this residue - disregarded by the researchers - was no longer useful for crafts, resulting in less off-season income for the women in the family. While the family may have had more rice and the husbands (or other male household head) may have had more income, net family income was not necessarily greater.

EXPLORATORY FACTOR: EXPENDITURES

KEY ISSUE: Do men and women have individual financial responsibilities? Who pays what? Women and men have different expenditure patterns and financial responsibilities. In some parts of the world, men and women have very separate purses, with each responsible for specific household expenses. This factor is important in the design of projects that will affect family income. It provides a broader perspective for the decision on a project or program's target audience.

Reference Information

Knowledge of family expenditure patterns will be very helpful in checking assumptions that increasing one family member's income (sometimes at the expense of another member) will benefit the family overall.

A common division of financial responsibilities is that men are responsible for house building repairs, livestock, land purchases, while women provide food (home grown or purchased), pay school and medical fees: most of the day-to-day expenses. HOWEVER, this varies widely among and within different cultures.

Research indicates that around the world women contribute a larger proportion of their income to household expenses than do men. Women typically contribute 90-95% of their income to family expenses, while men's contribution ranges from 45 to 75% of their income.

CASE EXAMPLE: Contributions to Household Income in South India In a study of very poor agriculture households in South India, wives earned a median income that was 55% of their mates'; they contributed an average of 93% of their mates' income to family expenses. This meant that their contribution equaled 84% of their husbands'.

Increases in women's income have been closely correlated with increases in family well-being, as measured by nutritional and educational status of children in some countries.

CASE EXAMPLE: Women's Gardens and Child Nutrition in India Another study in South India found that mothers with gardens or income had better nourished children than those who did not. The single largest contributor to the child's nutrition was the presence of a home garden and produce distributed by the mother. There was no positive increase in child nutrition as paternal income rose, but increasing maternal income did benefit child nutrition. Data indicated that resources under the mother's control was the most important factor in level of child nutrition.

Reference Information

CASE EXAMPLE: Male/Female Wage Increases and Child Nutrition in the Philippines A longitudinal study of 800 rural Filipino households discovered that as the wife's estimated wage rate rose, both she and her children did relatively better in terms of intrahousehold allocation of calories; the male household head typically had the largest allocation of calories in the household. An inverse relationship was found between increases in the estimated wage of a male household head and child nutrition.

An important aspect in gender differences is savings patterns, another form of expenditures. Women as a rule do not deposit their savings in formal sector institutions, for reasons ranging from lack of literacy, to deposit and withdrawal conditions, to minimum deposit requirements. Instead, women tend to rely on savings associations such as tontines, burial societies, and other forms of savings clubs, the objectives of which are very specific. Projects and programs which look to mobilize savings (described as considerable) of either rural or urban people need to look at the savings motivation and mechanism of the men and women savers before making investment potential projections.

EXPLORATORY FACTOR: RESOURCES

KEY ISSUE: Who has access to and who controls resources needed to improve economic well-being?

"Resources" include land, labor, capital, information, education, technical assistance, and other elements that lead to enhanced economic and social well-being.

"Access to" and "Control of" resources have very different meanings and implications; access refers to being able to use something but not establishing parameters for its use -- it can always be taken away. The difference is in the decision-making power over usage.

Women and men often have different access to resources. This differential access affects their ability to participate in and benefit from projects in a way that reflects their roles and responsibilities. In many parts of the world, women do not control their own labor or income; they are often unable to obtain credit without their husband's or another male family member's signature. In some countries, women are required to have their husband's permission to obtain contraception. Lack of access to information, credit, and other resources has limited women's contribution to economic development on a broad scale and has affected project success.

Reference Information

CASE EXAMPLE: Access to and Control of Project Resources in Guatemala

In Guatemala, three villages were involved in a vegetable contract growing scheme. In two villages, women were expected to take time away from their own income-generating and family activities to work on crops their husbands had contracted to produce. In one village the cooperative coordinating the project paid "household heads" for all family labor. Women received little of the proceeds of their work, and yields were much lower than where women were paid directly.

Women often have less access to education and one of the results is they are less likely to know the national European languages or other languages spoken in the country. Therefore, extension agents, credit program promotions, and other development-related activities are less accessible to women. Men and women often have different channels for receiving information. Family planning programs increasingly use commercial marketing techniques to match the contraceptive information and distribution system with gender-based cultural values and channels for receiving information.

As noted earlier, access to land is often controlled by male household heads. Despite their responsibility for providing food to the family, women may be allocated fields that are far away and less fertile.

CASE EXAMPLE: Farming Systems Project in Rwanda

In a Farming Systems project in Rwanda, an agronomist working with farmers was encouraged to tag soil samples to identify male and female fields. The agronomist thought this was unnecessary, but finally agreed to do so. The agronomist was surprised to discover that the women's fields were less fertile, requiring different fertilizer recommendations from those for their male counterparts.

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GENDER ANALYSIS: CONCLUSION-DRAWING FACTORS Gender analysis provides the basis for conclusions about constraints to and opportunities for programming that result from gender differences.

CONCLUSION-DRAWING FACTOR: CONSTRAINTS

KEY ISSUE: How are the constraints to participation in and/or benefits from a particular project or program different for women than for men?

Based on the analysis of the male:female differences in gender analysis, programmers can draw conclusions about gender-specific constraints relevant to a specific project or program. Information from the baseline situation is synthesized and then used in formulating recommendations for program or project design and adaptation. This process is carried on in the context of project/program goals and purposes.

For example, in some efforts to provide credit for small businesses, it has been determined from the assessment of sources of income that both males and females are involved in small-scale manufacturing or trading. Project designers should, in these cases, review gender-specific constraints to starting small businesses, such as collateral requirements or lending procedures.

In an attempt to increase food production by increasing land under cultivation, planners would first identify the target audience for a program by identifying who does what in the situation. If the primary food producers are female, project designers would then identify constraints specific to women such as land ownership, access and control of labor, etc. This would enable planners to design strategies to address those specific constraints.

CONCLUSION-DRAWING FACTOR: OPPORTUNITIES

KEY ISSUE: What opportunities for enhancing development programs are provided by gender-specific roles and responsibilities?

Gender analysis can reveal information that increases opportunities for more effective project planning. For example, knowledge of differences in men's and women's savings strategies can indicate new ways to mobilize savings and thus establish stronger credit programs. Awareness of how men and women receive information (e.g., through newspapers, radio, at the health clinic) can assist in designing effective information dissemination systems for family planning programs. Knowing differences in constraints to mobility between and within towns can assist in designing primary school programs that increase both male and female enrollment. Knowledge of intra-household responsibility for seed selection for next year's planting provides an opportunity for agricultural researchers to gain greater understanding of the drought-resistant, early maturing, and disease-resistant characteristics of a particular plant variety.

SUMMARY OF PRESENTATION The trainer should finish the presentation with a brief summary. The essential points to be stressed in the summary are:

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- ▶ The four "Exploratory Factors" (labor, income, expenditures, resources) represent a method for identifying at a general level gender-based roles and responsibilities. The analysis is then used in project design and adaptation to draw conclusions about gender-based constraints and opportunities in programming.
- ▶ Since no generic process can adequately address all situations, it may be necessary to add a fifth factor, "Other," to this analytical framework.

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SESSION 3: GENDER ANALYSIS

GENDER INFORMATION FRAMEWORK

The trainer presents A.I.D.'s major tool used in gender analysis and programming: the Gender Information Framework (GIF). While the GIF is available in three forms (as a book-size document; in Executive Summary form; and in brochure form - the "Pocket GIF"), participants receive only the Executive Summary and the Pocket GIF. The first should be included in participant notebooks, and the Pocket GIF should be distributed at the end of this session.

GIF STRUCTURE The GIF was developed specifically for A.I.D. as a tool for facilitating the incorporation of gender issues into programming. The underlying premise, as indicated by the previous exercise, is that gender is important. Sex-disaggregated data and awareness of gender considerations in a project/program baseline situation are important for appropriate matching of project resources to the situation to be affected.

The process outlined in the GIF has three steps - the first two have just been practiced in the case example:

- ▶ Analyzing gender roles and responsibilities using the four exploratory factors;
- ▶ Drawing conclusions about gender issues in the baseline situation. Both this and the above element are found in the "Gender Analysis Map" of the GIF.
- ▶ Incorporating information from the gender analysis into programs/projects. Guidelines for how to use this information in programming are presented in the form of "Gender Considerations" for four of A.I.D.'s programming documents: the Project Identification Document (PID), Project Paper (PP), Country Development Strategy Statement (CDSS), and Action Plan (AP).

The GIF also contains a "Summary of Guidelines for Document Review," which lists general guidelines for incorporating gender in program documents.

"GENDER CONSIDERATIONS" SECTION OVERVIEW The trainer continues the presentation of the GIF, moving to the section called "Gender Considerations."

The case example work just completed provided practice on the gender analysis process described in the Gender Analysis Map. The Gender Considerations section provides information specific to the process for preparation of A.I.D.'s major documents in the course of a project's existence. This section was developed to follow A.I.D.'s handbook guidance for preparation of the Project Identification Document (PID), Project Paper (PP), Country Development Strategy Statement (CDSS), and Action Plan (AP). The trainer should make it very clear that this was

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not designed as a checklist or as a set of requirements; rather that it is a tool designed to stimulate thinking on gender issues at all stages of a project's life.

It should be noted that A.I.D. handbooks are revised regularly, so the GIF may not follow them exactly. However, the Gender Considerations section does follow the general layout and issues covered in programming documents.

The GIF reflects that fact that gender issues need to be considered throughout project documents. While, historically, a WID paragraph has been incorporated into social analyses in programming documents, legislation now requires each document to describe how women will be included as participants, impediments to women's participation, and what steps will be taken to deal with these impediments.

Finally, note that **Therefore, gender is now to be included in the main body of the document (inputs, outputs, budget, objectives, as appropriate, indicators, etc.), as well as in analytical sections.**

WHEN TO USE THE GIF The trainer should go through the GIF with the participants, highlighting the following suggestions for each of the processes listed below:

COUNTRY PROGRAMMING

The gender analysis process using the four exploratory and two conclusion-drawing factors should be incorporated into country level planning, although at a much more general level. For example, a country strategy should present a sex-disaggregated analysis of the labor force, including the informal economy; agriculture sector assessments should review both male and female roles as farm owners and laborers and other important issues for agricultural planning.

Assessments of opportunities for private sector development should supplement macro-economic information with information on male and female enterprises (source of income) to provide a more realistic picture of the development situation to be affected.

In terms of expenditures, an assessment of the numbers of female-headed households will deepen understanding of the economic situation among low-income families.

Country assessments should include information on gender differences in access to and control of resources such as education, training, or credit programs that A.I.D. assistance affects.

PROJECT DESIGN

Gender analysis will be more specific at the project design level. Where data are not available, data collection can be incorporated into pre-design studies or in collection of baseline data.

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MONITORING AND EVALUATION

Monitoring and evaluation systems should be set up to collect sex-disaggregated data that will enable identification of existing potential areas of gender differences in project participation, benefits, and unanticipated consequences.

THE GENDER INFORMATION FRAMEWORK
Guidelines for Incorporating Gender Considerations
into A.I.D. Development Activities

EXECUTIVE SUMMARY

June, 1991

Prepared for:
Office of Women in Development
Bureau for Program and Policy Coordination
U.S. Agency for International Development

The MayaTech Corporation

GENDER INFORMATION FRAMEWORK

I. INTRODUCTION

The **Gender Information Framework (GIF)** is a set of guidelines for incorporating gender considerations into the development programming cycle of the Agency for International Development (A.I.D.). Commissioned by A.I.D.'s Office of Women in Development (PPC/WID), the GIF is a step-by-step process for addressing gender issues in both project/program design and document review activities. It also provides information on other analytic tools and resources for considering gender in development.

A.I.D. evaluation findings provide strong evidence that **gender is an important variable in the development process**; that is, projects matching resources to the roles and responsibilities of men and women are more effective than are projects that do not. Therefore, to ensure more positive project and program outcomes, planners need to identify key differences in male/female roles and responsibilities, analyze the implications of these differences for programming, and incorporate that information into development activities.

The GIF provides a three-step framework for this process. Its core elements are:

- **Gender Analysis Map:** As its name implies, the "map" guides the user through a process, suggesting where to look. In **Step One** it helps the user to identify important gender factors in the baseline situation: the differences in men's and women's roles and responsibilities. In **Step Two**, it helps the user to take a look at the gender-specific constraints and opportunities identified in the baseline situation. These first two steps described in the Gender Analysis Map are not specific to A.I.D. and may be applicable to other development organizations.
- **Gender Considerations Guide:** Findings gleaned from the gender analysis undertaken in Steps One and Two can be incorporated into programs and projects with guidance found in **Step Three, Gender Considerations Guide**. The "Gender Considerations" sections have been designed primarily for A.I.D. use, presenting guidelines for key A.I.D. documents including the Country Development Strategy Statement (CDSS), Action Plan (AP), Project Identification Document (PID), and Project Paper (PP). Even though these documents are specific to A.I.D., they parallel documents used in the overall programming cycles of other development agencies, thus making the GIF adaptable for wider application.

The GIF also includes a **Summary of Guidelines for Documents Review**, which briefly summarizes how and where to include gender considerations in A.I.D.'s documentation processing, including planning, administrative, and evaluation documents.

This Executive Summary is drawn from a larger work, **"The Gender Information Framework: Gender Considerations in Development,"** which is available in its entirety on request from the Office of Women in Development.

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II. GENDER ANALYSIS MAP: DETAILED DESCRIPTION

A. OVERVIEW OF COMPONENTS

The **Gender Analysis Map (GAM)** provides a tool for initial assessment of important gender differences that can affect peoples' ability to participate in and benefit from a development activity. The two-step analytical process is described below.

Step One involves information-gathering on four key socio-economic factors -- allocation of labor, income, expenditure patterns, and access to/control of resources -- in order to identify male/female roles and responsibilities. These are called **Exploratory Factors**.

In **Step Two**, the **Gender Analysis Map** guides the analysis of identified gender roles and responsibilities to infer differences in men's and women's constraints to participating in, contributing to, and/or obtaining benefits from development programs and projects. Conclusions are also drawn about opportunities for increasing project effectiveness by recognizing and building on differences in gender roles, responsibilities, skills, and knowledge.

This process has been designed to indicate where development practitioners must first look to see how gender could affect the success of a project or program. Of course, not all factors in this framework will be equally important for all kinds of projects. Neither will the Gender Analysis Map always yield complete information; however, it will very often provide clues that suggest where further information is needed.

B. STEPS IN GENDER ANALYSIS

In the step-by-step analytical process that follows, the four key socio-economic factors noted above are examined in more detail, and key issues and specific questions to address for each Exploratory Factor are listed. Examples of kinds of programs and projects where each factor is likely to be important are also indicated.

STEP ONE

Use the four **EXPLORATORY FACTORS** below to identify where gender could intervene in social and economic production systems to be affected by development activities.

FACTOR: ALLOCATION OF LABOR: Important for agriculture, natural resource management, education, health-related projects. Must look at both household tasks and tasks contributing to family income production.

- Who is responsible for which aspects of household maintenance (fuel/water provision, building maintenance, family health, child care, food preparation, etc.)?

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- What is time allocation by gender and-age? How do time and labor allocations vary with economic class or position in the household?
- What activities of male and female household members contribute to agriculture production and livestock production? (Analyze by crop and/or by livestock animal.) How do these activities vary by season?
- For enterprise development activities, is family labor included in enterprise accounts? How do family members contribute labor? Who is responsible for bookkeeping, for cleaning and repairs, for product finishing and packaging, for product sales?

FACTOR: INCOME: Important for enterprise development, agriculture, health; projects counting on user fees.

- What is male/female labor force participation by sector, both formal and informal?
- What are primary sources of income for men and women in rural and/or urban households (wage labor, small-scale enterprise)? How much income does each of these activities provide? How, and where do men and women market goods and services? What is the source of their raw materials?
- For farm-related income, how much is generated by men/women from crops, livestock, crop/livestock by-products (e.g., milk, manure) and crop biomass (stalks, husks)? What percentage of family income does self-provisioning represent?
- How do incomes vary by season?
- To what extent are technical assistance, credit, purchased raw materials, and other "inputs" currently used by male/female family members to increase productivity?

FACTOR: EXPENDITURE PATTERNS: Important for projects that directly or indirectly change allocation of labor and access to resources, such as agricultural projects, contract growing schemes, natural resource management projects, or projects that will change fee structure for services.

- Who is responsible for which elements of family expenses and provisioning (e.g., staple foods, vegetables, school fees, ceremonies, medical expenses, clothing)?
- How could changes to family member incomes affect ability to meet family financial obligations?

FACTOR: RESOURCES: Access to and control over all types of resources assumed to be important to the success of the project (important for all projects).

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- For the unit of analysis, what resources (e.g., credit, labor, time, land, training) are required for activities affected by the project?
- How is access to and control of these resources different for men and women? How does that affect ability to increase economic productivity or improve family well-being?

OTHER FACTORS

- What other factors, outside labor, income, expenditure patterns and resources, are basic to analysis of YOUR situation?
- Decide what questions should be answered in order to help determine whether there are or may be gender-related differences to each of these other factors.

STEP TWO

Use the CONCLUSION-DRAWING FACTORS below to arrive at significant gender differences which need to be taken into account in planning or adapting the project under consideration.

FACTOR: CONSTRAINTS

- For the unit of analysis and the project/program under consideration, what are the key differences between men's and women's constraints (e.g., labor, time, access to credit, education, training, other)?
- How do these affect ability to contribute to or benefit from a program? What are the implications for incentive to participate?

FACTOR: OPPORTUNITIES

- For the unit of analysis and the project/program under consideration, what are the opportunities for increasing project effectiveness by recognizing and building on gender-based roles, responsibilities, skills, and knowledge?

III GENDER CONSIDERATIONS GUIDE

A. OVERVIEW

Step Three in the GIF process provides guidance on where to incorporate information about significant gender differences into four A.I.D. documents: the Country Development Strategy Statement (CDSS), the Action

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Plan (AP), the Project Identification Document (PID), and the Project Paper (PP). To the extent possible, the guidelines for incorporating gender considerations into each document follow the format for document preparation presented in the relevant A.I.D. handbooks and guidance cables.

Key comments and questions are provided and indicate additional detail needed. These questions are meant to stimulate thinking about what needs to be considered in a particular situation. The user should select from the questions presented those that are most relevant to the specific development setting.

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GENDER CONSIDERATIONS: COUNTRY DEVELOPMENT STRATEGY STATEMENT (CDSS)

I. COUNTRY DEVELOPMENT PERFORMANCE AND STRATEGY

A. Basic Characteristics of the Economy

- A.1 Identify significant gender differences in participation in the economy, including rates of participation, location, and skills in the rural and urban labor force, in both formal and informal sector employment; also income distribution by gender within these characteristics.

B. Record of Development Performance

- B.1 Disaggregate by gender changes within the past five years in poverty, employment, and access to resources contributing to increased productivity (e.g., labor force mobility, land, credit, training, technical assistance, etc.).
- B.2 Examine male/female differences in participation in private, political, and social institutions.
- B.3 Examine differential effects of the development of democratic political and economic institutions on male/female participation in and contribution to national economies.
- B.4 Describe gender differences in key areas of social well-being, including health, nutrition, education (e.g., education: enrollment and completion rates at all levels, adult literacy rates; or family planning: male and female acceptors, gender differences in knowledge, attitudes, practices).
- B.5 Examine relative dependence of the sexes on various elements of public spending and employment.
- B.6 Examine the impact of differences in access to education and other resources on male/female ability to respond to economic adjustment policies. Consider the implications for national development strategies.
- B.7 Describe male and female internal and external rates of migration, corresponding poverty indices, nutrition, etc.
- B.8 Consider how gender-differentiated roles and responsibilities contribute to current trends in deforestation, desertification, and other aspects of environmental deterioration.

C. Summary of Macroeconomic Analysis

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C.1 Consider constraints to opportunities for increasing productivity resulting from gender differences in skills and knowledge in agriculture and enterprise development activities.

D. Summary of Sector and Key Subsector Assessments

D.1 Disaggregate statistical data by sex where available.

D.2 In sectors where men and women are both economically active, discuss gender-related constraints to and opportunities for progress in that economic activity.

E. Institutional and Human Resource Base for Development

E.1 Describe key gender differences in the socio-cultural and institutional context for development; for example, how do social systems and cultural patterns, migration, urbanization, public and private institutional systems differentially affect men's and women's contribution to social and economic development?

F. Host Country Development Strategy and Policy Orientation

F.1 Describe government policies toward full participation of women in economic development, particularly in those sectors in which A.I.D. is interested (e.g., legal and/or regulatory barriers to obtaining credit; subsidies for sectors in which males/females predominate).

II. OPPORTUNITIES AND CONSTRAINTS

A. Key Economic Opportunities for the Country

A.1 Consider how untapped or underutilized economic productive capacities among women and men might be utilized for progress.

B. Key Constraints to Development

B.1 Consider how constitutional, civil, and customary laws affect men's and women's ability to respond to development opportunities.

B.2 Examine what categories of people have access to public goods, such as those directed toward infrastructure, education, preventive health, nutrition, the environment, science and

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technology, and natural resources. How do gender differences in access inhibit growth and development?

III. POLITICAL ECONOMY OF REFORMS AND INSTITUTIONAL CHANGE

A. Supporting Coalition for Current Policies

- A.1 Consider the long-term vs. short-term gains and losses resulting from current policies that constrain women.

B. Needed Policy Reforms

- B.1 Consider if and how anticipated benefits from proposed policy reforms would:

- have a differential impact by gender
- reach low-income female-headed households

- B.2 If analysis of constraints to development indicates government policies impede contribution of women to national economic development, what policies would be most appropriate for dialogue with host country government?

C. Institutional Changes and the Sustainability of Reformed Policies

- C.1 Consider what institutional changes are needed to sustain host country commitment to continuing considerations of gender issues related to economic and civil freedoms in their development policies.

IV. DONOR PROGRAMS, DONOR COORDINATION, AND OFFICIAL DEVELOPMENT ASSISTANCE LEVELS

Consider how a donor WID Committee might strengthen the effort to more fully incorporate gender issues into the host country's development planning activities.

V. U.S. DEVELOPMENT ASSISTANCE STRATEGY

- A. Where women are economically active in a sector, consider how Mission strategy assists women directly and indirectly to increase their productivity in that sector?
- B. Examine how gender differences in ability to respond to democratic pluralism, policy reform, and/or structural adjustment initiatives have been taken into account in the design of the Mission strategy.

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- C. Consider what proportion of projects assist women's productive activities compared to those that provide health or other services? How does this compare with assistance to men in these areas?
- D. What steps are included in the Mission strategy to institutionalize consideration of gender issues in Mission programming? What benchmarks have been established and what indicators of success?
- E. Where data have not been available to adequately define gender issues in sector assessments and the mission strategy, indicate what steps will be taken within the strategy under development to obtain needed data.
- F. Consider if both women and men participated in the dialogue that leads to problem identification, selection, program and project design, and evaluation.
- G. Disaggregate objectives, benchmarks, and indicators of goal achievement by gender where appropriate and feasible.

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GENDER CONSIDERATIONS: ACTION PLAN

I. REVIEW OF PROGRESS TOWARD ACHIEVING A.I.D. STRATEGY OBJECTIVES

- A. Disaggregate data by sex wherever possible in program impact assessment.
 - A.1 In sectors of A.I.D. activity, for males and females in both urban and rural areas, describe changes in: labor force participation rates; also primary sources of income, including family enterprises, farm enterprises and wage labor in the formal and informal sectors.
 - A.2 Consider trends in male/female division of labor for major agricultural activities (e.g., production responsibilities by crop or animal, marketing, post-harvest activities).
 - A.3 Identify percentage of female-headed households.
 - A.4 Identify available data and additional data needed.
- B. Incorporate gender considerations into background information and review of current projects/programs.
 - B.1 Consider how constraints to participation in economic development differ for men and women, with emphasis on sectors of A.I.D. activity.
 - B.2 Examine if and how gender-based roles and responsibilities pose different constraints to men's and women's ability to participate in and contribute to A.I.D. programs.
 - B.3 Examine differential impacts, if any, of Mission programs on men and women.
 - B.4 Consider how opportunities presented by gender-based differences in skills and knowledge have been incorporated into design of program strategies.
 - B.5 Consider which projects/programs assist women directly to increase earnings and/or food production and which assist indirectly. Compare the proportion of projects that assist women's economic activities to those that provide health or other social services.
 - B.6 Assess availability of sex-disaggregated data; also, extent to which data available enable monitoring and adaptation of current mainstream projects to take into account important gender-based differences.

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II. IMPLICATIONS FOR FUTURE PROGRAM ACTION

Describe modifications planned for existing programs to address gender considerations, as appropriate.

III. STRATEGIES, OBJECTIVES, TARGETS, AND BENCHMARKS

- A. Describe how gender-based roles and responsibilities affect long-term Mission sector development strategies.
- B. Disaggregate by gender short-term targets to meet objectives, as well as benchmarks on progress toward meeting objectives.

IV. MISSION MANAGEMENT AND MONITORING

- A. Describe current progress and future steps to enhance Mission capability to incorporate gender considerations into programming, including:
 - benchmarks for measuring institutionalization of gender considerations into the programming process,
 - strategy for collection of data needed for monitoring and adaptation of current and planned projects.

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GENDER CONSIDERATIONS: PROJECT IDENTIFICATION DOCUMENT (PID)

I. PROJECT DESCRIPTION

- A. **Problem Statement:** Consider how gender affects the social and economic aspects of the problem to be addressed.
- How do men and women participate in activities the project will affect?
 - How do gender-based patterns related to division of labor, income, expenditure, or other key factors affect the problem?
 - How do gender-based constraints to access to or control of resources affect the situation?
 - How do both men and women participate in defining the problem?
- B. **Statement of Expected Project Achievements:** Consider to what extent the participation of both men and women will affect achievement of project goal and purposes.
- Does the project design enable and encourage participation of and benefits to both men and women?

II. OUTLINE OF THE PROJECT AND HOW IT WILL WORK

A. Project Elements

- A.1 Identify project strategies that target project/program resources according to men's and women's patterns of income, expenditures, allocation of labor, and resource control.
- How will constraints to participation and/or benefits from the project be different for males and females?
 - How can the project use the unique skills of men and women, based on gender-based roles and responsibilities, to solve the problem?
- A.2 Identify technical issues in the project design that may need special attention to gender issues.
- Whose (male/female) income, labor, ability to meet financial responsibilities will the technical assistance or project technology affect?

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- Will the project's technical resources be targeted appropriately, given gender-based roles and responsibilities?
- How does the project design take into account gender-specific constraints in access to resources?
- Have host country men and women both participated in designing strategies to address project constraints?
- A.3 Review proposed project components for consistency with the social and economic organization of activities the project will affect, as well as constraints and opportunities entailed in that organization.
- A.4 Include strategies to obtain sex-disaggregated data and feedback from both men and women in project monitoring and evaluation systems where their activities will be affected by the project or program.

III. FACTORS AFFECTING PROJECT SELECTION AND FURTHER CONSIDERATION

A. **Social Considerations**

- A.1 Include known information about key gender variables in analysis of factors affecting project activities
 - What information is available and what is needed on gender differences in key socio-cultural factors including:
 - Labor force participation overall; labor force mobility between sectors; intra-household division and seasonality of labor as appropriate to the project.
 - Major sources of income for males/females; intra-household incomes and expenditures and their control; seasonal variations in income and expenditures.
 - Access to and control of resources in the legal, socio-cultural, and economic environment affecting the project.
 - Asymmetric rights and obligations within the household governing allocation of labor and decision-making authority.

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- A.2 Consider who benefits from the project, and how they benefit
- Are beneficiaries appropriate, given the social organization of activities the project will affect?
 - Will project benefits and their distribution provide sufficient incentive to encourage participation?
- A.3 Identify gender considerations related to ability to participate in project.
- What are prerequisites to participation (e.g., literacy, collateral, mobility, land), and how do these affect men's and women's ability to participate and benefit?
 - How do differences in access to education, credit, etc., affect ability to participate and/or contribute?
- A.4 Assess differential impact of project by gender.
- Will the project have differential short- or long-term impact on women and men?
 - How might this affect project sustainability?
- B. **Economic Considerations:** Examine how the proposed approach will affect men's and women's economic roles and improve family well-being.
- Are economic benefits consistent with income and expenditure patterns of women and men?
 - How will project interventions affect these patterns?
 - What additional information is needed to fully consider these questions?
- C. **Technical Considerations:** Assess the technical expertise and experience of proposed implementing agencies (host country and U.S.) in reaching women; consider developing such capacity as part of project, if needed.
- What is the experience of implementing agencies in reaching women and men in their separate and joint economic roles?
 - What linkages exist to ensure feedback from both men and women to project implementers, including advisors, extensionists, researchers, and others?

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- D. **Budget Considerations:** Examine budget estimates for consistency with issues discussed in social, economic, and technical considerations.
- Where gender is a factor in activities to be affected by the project, does the budget include funds necessary for appropriate staffing; outreach to both men and women; and collection of sex-disaggregated data for project refinement, monitoring, and evaluation?
- E. **Design Strategy**
- E.1 Summarize need for sex-disaggregated data for Project Paper (PP) or pre-PP study; indicate how such data will be collected and analyzed.
 - E.2 Recommend PP team composition necessary to ensure that gender issues are effectively addressed.
 - E.3 Include considerations of gender issues in PP team members' Scopes of Work.
 - E.4 Recommend inclusion of gender criteria in PP discussion of Request for Proposals.

GENDER CONSIDERATIONS: PROJECT PAPER (PP)

I. PROJECT RATIONALE AND DESCRIPTION

A. **Problem:** Consider how gender affects the problem to be addressed.

- How do men and women participate in the activities the project will affect, directly or indirectly? How is the problem different for men and women? Have both men and women participated in defining the problem and identifying solutions?

B. **Project Elements**

B.1 Develop strategies to incorporate women and men in project, as indicated from technical, financial, economic, social soundness, and administrative analyses.

- Where women play a major role in project-related activities, how do proposed strategies utilize and expand women's economic productivity?
- What strategies address the constraints to participation that result from gender differences in roles and responsibilities? For example, are gender differences in mobility, education, access to resources taken into account? Will outreach strategies, timing and location, scope and scale of project elements (e.g., size of loans, kind of training, type of equipment) enable the participation of both men and women?

B.2 How could policy dialogue on gender issues important to this project's/program's implementation be effected?

B.3 Assess the consistency between project elements, goal and purpose, inputs and outputs, and analyses.

- Are gender issues incorporated throughout, and are they consistent with gender-based roles and responsibilities in the baseline situation?

B.4 Indicate strategies to collect sex-disaggregated baseline data where data are unavailable.

C. **Cost Estimates:** Include in cost estimates funds needed for collection of sex-disaggregated data for project refinement, monitoring and evaluation; also funds to enable the participation of both men and women (e.g., for training, materials development, project personnel).

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D. Implementation Plan

- D.1 Identify male and female training participants; consider gender differences in the design of eligibility criteria for training and recruitment strategies.
- D.2 Include appropriate project/program personnel to enable matching project activities with gender-based roles and responsibilities.

II. SUMMARIES OF ANALYSES

A. **Technical Assessment:** Include gender as a variable in technology needs assessment, analysis of cultural suitability, and potential impacts.

- A.1 Needs Assessment: What provisions are made for local men's and women's participation in selecting technical approach and technologies?
- A.2 Access: Does the project approach (technology, information, credit, etc.) take into account gender and class differences in access to cash, land, labor, or other resources that might affect access?
- A.3 Suitability: Where women play a major role in project-related activities, how will the project determine whether proposed technical innovations or assistance is appropriate and acceptable to them?
- A.4 Impact: Given allocation of tasks by gender:
 - Will the technical approach or package increase labor differentially for men and women?
 - Will it affect relative access to resources of men and women?
 - How will changes from the technology affect both men's and women's domestic responsibilities and their ability to provide income or food for their families?

B. **Financial Analysis:** Review intra-household differences in incomes and expenditures.

- Are there gender-based constraints to ability to pay for project services and inputs or otherwise participate in project? If yes, what are the implications for overall impact and achievement of goals?

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- How can the project program build on existing revenue-generating, expenditure, and savings patterns to promote increased financial well-being among both men and women?
- How will the project affect incomes of both male and female family members?
- C. **Economic Analysis:** Specify costs and benefits for males and females in terms of opportunity costs of labor, access to productive resources, status, and ability to meet family expenses.
- D. **Social Soundness Analysis**
 - D.1 **Examine men's and women's roles in activities** the project will affect, and assess whether project inputs are appropriate according to the social and economic organization of activities.
 - What is the division of labor/time/decision-making authority in project-related activities? How will the project affect/be affected by gender differences in these areas?
 - What opportunities for increasing productivity and/or socio-economic well-being are offered by male/female roles and responsibilities?
 - D.2 **Examine prerequisites for participation** in project and how gender-based constraints will affect ability of household members to participate.
 - What are the formal/informal prerequisites to participation (e.g., literacy, collateral, labor mobility)?
 - How does gender affect access to and control of resources (land, labor, capital, decision-making) affecting project participation?
 - D.3 **Examine the distribution of benefits** to women and men and how benefits affect incentives to participate.
 - Which household members benefit and how? Who decides benefit allocation?
 - Do benefits to individual household members provide sufficient incentive to participate? Do they offset any additional work that might be required?

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D.4 **Assess impact**, short- and long-term, direct and indirect on key gender differences in roles and responsibilities.

- How will the project affect patterns of employment, consumption, resource allocation, and status?
- What are the implications of these changes for project sustainability and long-term development goals?

E. **Administrative Analysis**

E.1 Describe the implementing institution's ability and experience in reaching both men and women; examine implications for project strategies.

E.2 Indicate what steps might be necessary, if any, to improve implementing agency's ability to provide technical assistance to women.

E.3 Consider additional or alternative institutions for project administration, if appropriate, to ensure both men and women have access to project resources.

SESSION 4: DATA GATHERING

RAPID LOW-COST DATA COLLECTION METHODS

RAPID LOW-COST DATA COLLECTION

1. Key Informant Interviews
2. Focus Group Interviews
3. Community Interviews
4. Direct Observation
5. Informal Surveys

The trainer reviews each of the five methods listed in the box at the left, noting where they are particularly useful and where they are inappropriate. The trainer can use the data needs identified previously to illustrate how these methods might provide the needed data. Participants can add their own experiences with these kinds of methods.

► KEY INFORMANT INTERVIEWS

Key informant interviews are most appropriate for gathering information about organizations and institutions, cultural patterns, values, and beliefs, when general, descriptive information is sufficient for decision-making. A useful tool for interpretation of quantitative data, they help to answer the question, "why?", and provide information on motivations and attitudes that guide people's behavior. Finally, key informant interviews are a mechanism for generating suggestions and recommendations, as well as developing questions, hypotheses, and propositions for further testing and refinement.

Skills and knowledge required include:

- substantive knowledge of the subject and practical experience in order to frame questions and have real interactive discussion;
- knowledge of qualitative interview procedures;

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- knowledge of local language to avoid loss of information through translation; and
- good inter-personal communication skills.

Advantages: key informant interviews provide in-depth information, have the flexibility to enable pursuit of issues and ideas not originally anticipated in project or survey designs, are relatively inexpensive, and can be carried out quickly. Interviewer qualifications are also less demanding, thereby making it easier to find people with the necessary skills.

Limitations: Because key informant interviews do not generate quantitative data, they cannot be used when such quantitative data are required. The findings can be biased if key informants are not carefully selected: key informants should include both women and men and people of all relevant socio-economic and ethnic groupings. Similarly, interviewer biases are possible, and criteria for selection of interviewers may need to reflect gender and socio-economic characteristics of the various groups to be interviewed. Also, training of interviewers is key.

► FOCUS GROUP INTERVIEWS

Focus group interviews are most appropriate for gathering ideas and hypotheses for development project or program design, including needs and requirements of the local populations, appropriateness of the project, and potential strategies for implementation. They are useful in assessing reactions to recommended project/program activities and explaining the responses of the local populations to project or program activities (e.g., why it is or is not working). Finally, they can be used to generate recommendations and suggestions for project adaptation.

Skills and knowledge required include:

- theoretical knowledge and practical experience with the topic to be investigated;
- proficiency in the language of interviewees: focus groups cannot be conducted through an interpreter; and
- training or experience in conducting group discussions.

Advantages: because they involve groups (vs. individuals), focus groups are a time-saving information-gathering mechanism. They are also economical because they do not require a large number of enumerators or lengthy periods in the field. They can reduce individual inhibitions, providing interviewees security in numbers. As well, group interviews are often the best way for male researchers to elicit women's opinions, especially in cultures where

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interaction between unrelated males and females is restricted. Finally, focus groups generate fresh ideas and insights because the participants stimulate each other.

Limitations: as with key-informant interviews, focus group discussions cannot provide quantitative data and are susceptible to the same kinds of interviewee and interviewer biases. Further, discussions in focus groups can be dominated by a few participants with a perspective not shared by others. This can result in a misleading impression about the range of viewpoints and degree of consensus.

► COMMUNITY INTERVIEWS

Community interviews are most appropriate when village or community level data are needed about the composition of the population, occupational patterns, and educational, medical, or other service facilities. They also help to further understanding about community needs, requirements, and expectations related to proposed development programs. Further, community interviews are useful for assessing extent of local support for a specific project affecting the community and for project/program evaluations.

Skills and knowledge required include:

- both substantive knowledge of and practical experience in the subject;
- ability to converse in the local language; and
- experience in conducting community interviews.

Advantages: community interviews enable direct interaction between project staff or researchers and a large number of people in the target population, providing a mechanism for information collection through both verbal responses and non-verbal behaviors. Community interviews can generate some quantitative data through votes on specific issues and through tabulation of comments and behaviors during the meeting. As with focus groups and key informant interviews, representation by men and women and by various socio-economic and ethnic groupings at community interviews is key to obtaining generalizable data. Because participants tend to correct each other, community interviews improve the validity of the data. Finally, they are cost-effective and provide data quickly.

Limitations: Community interviews are easily manipulated; often elites try to use them as a mechanism for articulating their own perspectives. A few articulate people can monopolize the discussion. Further, issues that can be discussed in individual interviews may not be pursued in a community forum because of social and political inhibitions.

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► DIRECT OBSERVATION

Direct observation is most appropriate when trying to understand an ongoing behavior or unfolding event (e.g., how decisions are made, how the clinic operates), when information about physical infrastructure is required, when delivery systems or services offered by public and private agencies are to be examined, and when preliminary, descriptive information is required.

Skills and knowledge required include:

- specialized knowledge of the subject from various perspectives (e.g., agronomic, organizational development, economic, women in development);
- skills in field observation, especially for the study of socioeconomic phenomena and processes; and
- knowledge of the local language, especially for socio-economic studies.

Advantages: direct observation enables the investigator to study a phenomenon in its natural setting quickly and economically, thereby providing a cost-effective mechanism to increase understanding of the situation. It can reveal social and economic conditions, problems, and behavior patterns key informants may be unaware of or unable to adequately describe. For example, often key informants will state that women are not active in commerce because traditional culture proscribed such behavior, while direct observation reveals women involved in street vending or small-scale production activities.

Limitations: direct observation is susceptible to observer bias, especially in the observation of social and economic (vs. physical) phenomena. For example, outside observers can overlook both the conditions and potential contributions to development of the poor, women, and other groupings. Assigning a multi-disciplinary team rather than an individual to carry out the observation and making investigators aware of the problem are ways to reduce the risk of observer bias. Incorporating both men and women on the team may also be useful.

Poor selection of observation sites can skew observation results; sites selected should be representative of the wider population (vs. simply accessible) to avoid developing a misleading picture of the situation.

It should also be noted that the act of observation can affect the behavior of people and organizations under observation (the "Hawthorne effect").

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► INFORMAL SURVEYS

Informal Surveys are most appropriate when quantitative information on attitudes, beliefs, and responses of a fairly homogeneous population is needed immediately. Informal surveys are also useful when it is difficult to construct a probability sample without considerable investment of time and resources. Finally, they can be used when some quantitative information is already available but additional data are required to complement it.

Skills and knowledge required include:

- in-depth knowledge of the subject to be covered by the informal survey;
- formal training and experience in conducting informal surveys; and
- knowledge of the local language; if the principal investigator does not speak the local language, s/he should have a deputy who is a native speaker.

Familiarity with the socioeconomic conditions of the survey area is also desirable.

Advantages: informal surveys can be used when well-designed, sample surveys are difficult or inadvisable to conduct. The quality of the data tends to be better in informal rather than large sample surveys, because the small size of the questionnaire results in fewer interview errors, coding tends to be more accurate when variables are limited, and the investigator is able to work more closely with staff. Further, informal surveys can be carried out quickly with limited personnel and economic resources.

Limitations: informal surveys cannot be used when an intensive understanding of a phenomenon or process is required, because they do not permit free and extended discussions. They are subject to sampling bias because probability sampling is not used. If respondents are not representative of the population, conclusions may be flawed and recommendations unjustified. (It is for this reason that disaggregation of data by sex is such a critical issue in all data collection methods.)

Finally, complex statistical data analysis is not always feasible in informal surveys because of the small sample size. For example, if out of 50 respondents only 8 are female farmers, the investigator may not be able to perform a comparative study of male and female farmers. However, the use of quota sampling can solve this problem. In addition, because there are only a few variables, the use of control variables in statistical analysis is restricted and sample errors cannot be computed.

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The trainer should finish the presentation by summarizing these methods, using the chart below as a guide. Copies should be distributed to participants.

Close this review by asking participants to share a few creative and effective methods from their experience for gathering sex-disaggregated data.

Survey Method	When Most Appropriate	Skills Required	Advantages	Limitations
Key Informant Interviews				
Focus Group Interviews				
Community Interviews				
Direct Observation				
Informal Surveys				
Other...				

SESSION 5: STRATEGIES TO OVERCOME BARRIERS

The trainer presents a list of specific project features to consider to ensure women are appropriately incorporated into the project. The list is shown on the following page. Information on each project feature follows, which should be supplemented by as many examples as possible of each feature; look to the GIF session for examples. Ask participants to talk about their experiences with how these project features have affected project effectiveness. Ask participants what strategies they have used to overcome the constraints these project features may pose. Participants usually have many examples they like to share. (The page numbers after each project feature on the following pages indicate the page in the Carloni report cited earlier.)

PROJECT FEATURES TO CONSIDER

- ▶ Choice of promotion strategy
- ▶ Choice of technical packages
- ▶ Timing and duration of activities
- ▶ Delivery systems
- ▶ Location of project activities or services
- ▶ Eligibility criteria
- ▶ Nature and distribution of benefits

CHOICE OF PROMOTION STRATEGY (p.51)

Promotion strategies need to take into account communication networks and language differences. Because of limited mobility and less education, women are less likely to speak a European or national language that must be learned in school. Women are therefore less able to take advantage of programs, education, and services. Therefore, language requirements need to be considered in outreach and training programs.

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Women usually have different communication networks. While men may receive information from newspapers, radios, or at men-only village meetings, women may give and receive information at the clinic, the well, or alternate sources. To ensure that information about resources or new technology is adequately disseminated, it is important to identify gender-specific communication networks.

APPROPRIATENESS OF PROPOSED TECHNICAL PACKAGES (p.43)

Male and female roles and responsibilities frequently require different technical approaches to development problems. Planners should ask: are technical packages applicable to all households (both male- and female-headed) or only those with certain types of resources? Are technical packages targeted for the person responsible for the activity and do they match that person's resources? Are credit procedures appropriate for both men and women? Do education and training curricula address productivity issues related to both men's and women's activities? Are contraceptive packages appropriate to the financial, sanitation, and prevailing cultural norms for men and women?

TIMING AND DURATION OF ACTIVITIES (p.50)

Women's time constraints differ from those of men because of their dual family and economic roles and responsibilities, which are often intertwined. Project activities, such as training or voluntary labor contributions, need to take into account women's daily and seasonal time constraints. Training held during morning food preparation hours, for example, essentially precludes the participation of many women.

OUTREACH OF EXISTING DELIVERY SYSTEMS (p.49)

Often women operate outside existing delivery systems. They frequently have less access to outreach/extension agents. There are a variety of explanations for this situation, ranging from cultural norms constraining contact between non-family males (extension agents) to lack of information appropriate to their needs provided by the delivery system.

LOCATION OF PROJECT ACTIVITIES AND SERVICES (p.50)

Cultural norms often restrict the mobility of women. They are less likely to be able to travel to distant training sites, clinics (including family planning clinics), village meetings to discuss where water wells and schools should be placed, banks or financial services, and the other myriad meetings and services development projects often provide.

ELIGIBILITY CRITERIA (p.42)

Eligibility criteria often preclude women's participation. English language requirements, for example, can reduce the eligible pool of women candidates for long-term training, since fewer women have had access to educational institutions where English is taught. Age limits on long-term training programs may inadvertently restrict women's participation, since often they must remain at home with their children. Credit programs that require land as collateral essentially eliminate women's participation in many cultures. In some instances, the criteria are more stringent than necessary and should be revised. For example, alternative forms of collateral could be devised. Other options could provide pre-departure training that would enable women to meet the requirements.

NATURE AND DISTRIBUTION OF BENEFITS (p.42)

Direct access to benefits affects incentives to participate. Where women are expected to work/participate but receive few benefits, which has occurred in agriculture and natural resource management projects, they are less likely to participate (no surprise here!).

SESSION 5: STRATEGIES TO OVERCOME BARRIERS (HANDOUT)

PROJECT FEATURES TO CONSIDER
for
MOST COMMONLY IDENTIFIED GENDER DIFFERENTIAL
CONSTRAINTS

- CHOICE OF PROMOTION STRATEGY
- CHOICE OF TECHNICAL PACKAGE
- TIMING AND DURATION OF ACTIVITIES
- DELIVERY SYSTEMS
- LOCATION OF PROJECT ACTIVITIES OR SERVICES
- DESIGN OF CREDIT COMPONENT
- ELIGIBILITY CRITERIA
- NATURE & DISTRIBUTION OF BENEFITS

Reference Information

INDIVIDUAL PREPARATION FOR PROJECT STRATEGY DISCUSSION

Project Title: _____

Sector: _____ Country: _____ Start/End: _____

Project Purpose: _____

1. Please list the project activities in which women's participation is crucial to achievement of the project's purpose.

2. In which of these activities has women's participation fallen short of expectations? (If your project has been successful in reaching and involving women, please go to #4.)

3. Please select one or more of these activities and describe the following:
 - a. how women in the target population were expected to participate in the project activity?

 - b. the project's actual experience (e.g., 30% fewer women than expected have applied for credit to purchase fertilizer)

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4. Following is a list of generally accepted barriers to women's participation in project activities.

- _____ Choice of promotion strategy (what, who, how)
- _____ Choice of technical package (suitable, acceptable)
- _____ Timing and duration of activities
- _____ Delivery system(s)
- _____ Location of project activities and services
- _____ Design of credit component
- _____ Eligibility criteria
- _____ Nature and distribution of benefits
- _____ Other

Which of these has proven to be problematic? Please describe briefly how the element has hindered women's participation in the project? If your project has successfully addressed these barriers, please share this information with the group.

5. What, if anything, has been done to address the problem?

SESSION 9: PLANNING FOR ACTION

Action Planning Model

Objective	Action	By whom	By when	Resources

Reference Information

SESSION 10: EVALUATION

GENDER CONSIDERATIONS IN DEVELOPMENT
WID TRAINING WORKSHOP

EVALUATION:

INTRODUCTION

Each of the day's Workshop Sessions is presented below. Please:

- Rate the sessions in order of the degree to which you perceive them as useful to you in incorporating gender considerations into your work. For each one, please provide an overall rating of your perception of its utility (1 = Lowest, 6 = Highest);
- Comment on your satisfaction with each of the sessions; and
- As appropriate, provide an example of how the session might be helpful to you in incorporating gender considerations into the development process.

Degree of Utility
(1 = Lowest, 6 = Highest)

SESSIONS

Session 1: Workshop Orientation _____

Comment:

Session 2: Exploring the Issues _____

Comment:

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GENDER CONSIDERATIONS IN DEVELOPMENT
WID TRAINING WORKSHOP

Session 3: Gender Analysis _____

Comment:

Session 4: Data Gathering _____

Comment:

Session 5: Strategies to Overcome Barriers to Women's
Participation in Development Activities _____

Comment:

Session 6: Managing the Process _____

Comment:

Reference Information

GENDER CONSIDERATIONS IN DEVELOPMENT
WID TRAINING WORKSHOP

Session 7: Individual Application _____

Comment:

Session 8: Gender Implications in the Policy Environment _____

Comment

Session 9: Planning for Action _____

Comment

General Comments on Workshop

Please provide any additional comments.

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GENDER CONSIDERATIONS IN DEVELOPMENT
WID TRAINING WORKSHOP

Workshop Goal and Objectives

Workshop Goal

Please rate the degree to which you believe that the overall Workshop Goal has been achieved, and comment on your rating. For purposes of this rating, the goal has been sub-divided into two parts. Please fill in the number that corresponds to your achievement rating (6 being achieved completely, and 1 being not at all achieved).

Achievement Rating
(1 = Lowest, 6 = Highest)

To increase awareness of the need to incorporate gender considerations into the development process and activities _____

Comment:

To increase knowledge about how to incorporate gender considerations into the development process and activities _____

Comment:

Participant Name

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EVALUATION
Gender Considerations in Development Workshop

Your considered responses to the following can help us prepare and deliver future training and will help achieve our development objectives. In each of the following, mark the selections with which you most agree:

1. The training achieved the intended objectives:

"GIF is introduced and practiced"

- ☐ completely
- ☐ substantially
- ☐ reasonably
- ☐ partially
- ☐ inadequately

The development situation is explored with respect to women's issues and gender considerations"

- ☐ completely
- ☐ substantially
- ☐ reasonably
- ☐ partially
- ☐ inadequately

"Further work needed on women's issues is identified"

- ☐ completely
- ☐ substantially
- ☐ reasonably
- ☐ partially
- ☐ inadequately

"Integration of GCID into organization's work has begun"

- ☐ completely
- ☐ substantially
- ☐ reasonably
- ☐ partially
- ☐ inadequately

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2. In general, I thought the pace of training activities was:

	Monday	Tuesday	Wednesday	Thursday
too fast	_____	_____	_____	_____
about right	_____	_____	_____	_____
too slow	_____	_____	_____	_____

3. In general, I thought the logistics were handled:

	Monday	Tuesday	Wednesday	Thursday
excellently	_____	_____	_____	_____
well	_____	_____	_____	_____
adequately	_____	_____	_____	_____
barely	_____	_____	_____	_____
poorly	_____	_____	_____	_____

4. In general, I thought the presentations were:

	resource people	GIF	data collection	policy/ legislation	action planning
excellent	_____	_____	_____	_____	_____
good	_____	_____	_____	_____	_____
adequate	_____	_____	_____	_____	_____
poor	_____	_____	_____	_____	_____

5. For me, the most helpful aspects of the workshop were:

6. For me, the least helpful aspects of the workshops were:

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Use "A" to select the answer you would have chosen at the beginning of the Workshop and use "B" to mark your selection now.

7. In my view as a development professional, gender considerations are:

- _____ (1) essential for planning and implementing all development activities.
- _____ (2) often but not always relevant to planning and implementation.
- _____ (3) an issue whose significance is not clear to me.
- _____ (4) a rarely significant issue for planning and implementation.
- _____ (5) an insignificant issue for planning and implementation.

8. The relevance of gender issues to the development situation is:

- _____ (1) very high
- _____ (2) somewhat relevant
- _____ (3) occasionally relevant
- _____ (4) rarely relevant
- _____ (5) never relevant

9. The relevance of gender issues to my work on development is:

- _____ (1) very high
- _____ (2) somewhat relevant
- _____ (3) occasionally relevant
- _____ (4) rarely relevant
- _____ (5) never relevant

10. This organization is dealing adequately and appropriately with gender issues:

- _____ (1) strongly agree
- _____ (2) agree
- _____ (3) unsure
- _____ (4) disagree
- _____ (5) strongly disagree

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11. I adequately understand the relevance of gender issues:

- _____ (1) strongly agree
- _____ (2) agree
- _____ (3) unsure
- _____ (4) disagree
- _____ (5) strongly disagree

12. My colleagues adequately understand the relevance of gender issues:

- _____ (1) strongly agree
- _____ (2) agree
- _____ (3) unsure
- _____ (4) disagree
- _____ (5) strongly disagree

Please add additional comments or suggestions below.